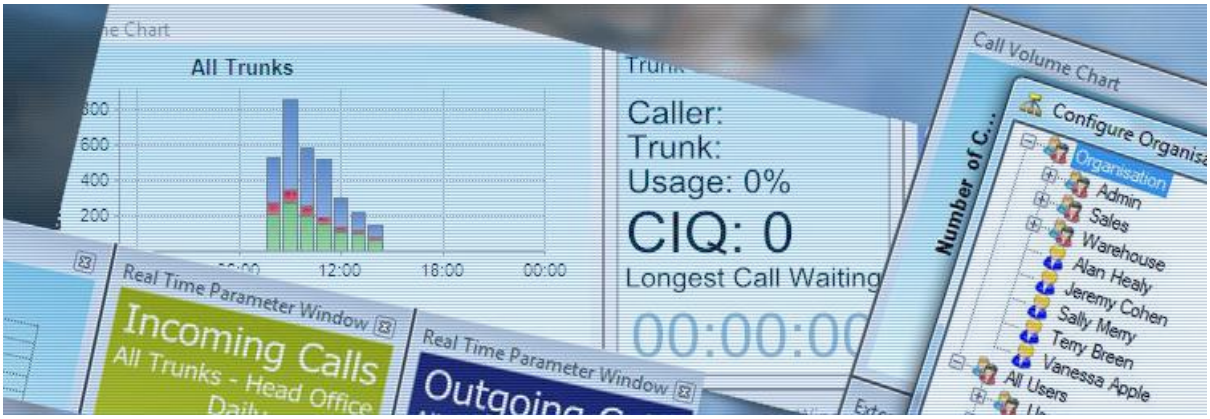
MyCalls End User Manual



Manage Communications

Measure Effectiveness

Improve Service

Control Costs

MYCALLS

MYCALLS CALL MANAGER

MYCALLS CALL CENTRE

For NEC SV8100, Aspire and XN120 PBX systems and MyCalls version 3.0.0.0

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Kelmar Software Solutions Ltd

Genesys Court

Denton Drive

Northwich

Cheshire

CW9 7LU

United Kingdom

MyCalls – Advanced Call Management System

WHAT THIS GUIDE CONTAINS

This end user guide contains essential information about MyCalls. It illustrates the use of the MyCalls application and then provides steps to customize the application to end user requirements.

WHO SHOULD READ THIS GUIDE

This guide is for end users of a MyCalls installation used in conjunction with an NEC SV8100, NEC Aspire or NEC XN120 PBX to assist with application customization and management.

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Chapter 1

Welcome to MyCalls

Welcome to MyCalls, the Call Accounting and Management application which puts you in control of the communications into and out of your business. With MyCalls you can measure all aspects of your telephone system and ensure that the management of your telephone system is kept within the boundaries that you set.

Not all features described in this manual are available for all versions of your telephone system or are available in the features enabled within the product license. As an example, all ACD related features including Pilot Numbers are only available on Aspire or SV8100 versions and have MyCalls Call Centre installed.

For upgrades to your license please contact your reseller.

MyCalls contains the following components:

Call Logging See at a glance all the important information you need to manage and plan your telephone communication strategy

Call Costing Set limits on call costs and staff costs associated with your calls

Comprehensive Alarm Functions Manage by exception. This gives you more free time to attend to the important matters of your business knowing you will be alerted to problems only when they occur.

Sophisticated Reporting Gives you summary and detailed analysis of the telephone data, you can gather reports on call data, user activity, response, call volumes, comparisons of call data, Device usage, ACD, queuing and routing, in fact all aspects of your phone usage. You can also create completely customised reports showing any value calculated across any date and time filtered down to devices or users of your choice.

Real Time Status Monitor the immediate status of your devices, extensions and users, such as calls in progress, call queues and extensions not in use.

Statistics windows View current and historical data. View single values such as incoming or outgoing call counts, abandoned call rates, group activity and statistics specifically tailored to your business model.

Call logs, Alarm logs and lists of unreturned calls all help you manage daily workloads.

Key things that MyCalls will do for you

Traffic Analysis: MyCalls can help you monitor your telephone system's traffic. Traffic reports can show if you have too many trunks (paying for rarely used extra phone lines) or not enough trunks (current phone lines are busy most of the day). These reports can also show you which calls were routed over particular trunks. By monitoring your phone system's "call routing" ability, you can be certain the correct calls are being routed to the least expensive trunk.

Reporting: You can generate the information you need, when you need it. For example: What is the most frequently dialled long-distance telephone number? How much money does your company spend making Premium Rate calls? How many times did your sales department call clients London last week? Which calls were more than 30 minutes long?

Toll-Fraud Alarms: MyCalls can provide you with a means of detecting toll fraud. There are numerous forms of toll fraud. Some of the most common forms of toll fraud include:

- Hackers calling in on one trunk and accessing an outside phone line.
- Excessive personal, long-distance calls made by employees.
- Real Time 'here and now' view of the use of the telephone system and the activities of the staff using it.

Billing: Hotels can take full advantage of MyCalls' billing features. In this environment, the call accounting system can "cost" the calls differently for guest and administrative telephone calls.

Staff Monitoring: MyCalls can be used to aid motivation and help improve staff performance by providing an objective measurement rather than relying on subjective impressions.

There are many applications for MyCalls and these systems do more than just help a company manage their call costs. MyCalls can be adapted to any business environment and the growing list of features is now allowing the application to integrate with many business activities beyond the traditional role of a call management system.

What do I need to configure first in the MyCalls application

All organizations will need to initially configure:

Trunks – For overall performance monitoring and call volume analysis

Extensions – To analyse individual staff call performance

Extension groups – To allow analysis by department

Organisation - To implement call recording rules and production of reports by hierarchy of users rather than extension, essential if users tend to use more than one extension

Call recording – To keep track of the specifics of calls and improve staff training

ACD and Agent Control– To measure queue performance and allow dynamic control of agent activities.

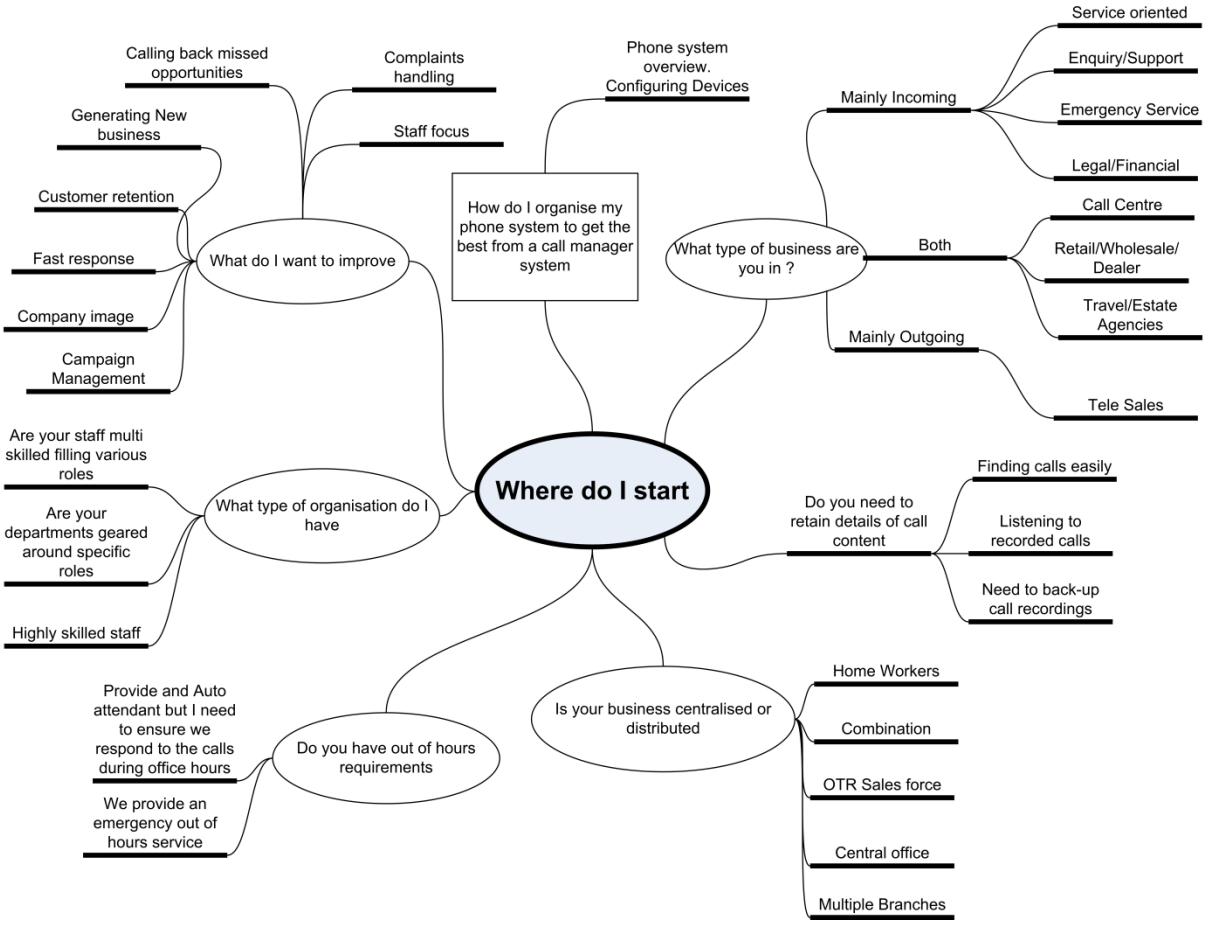
Alarms – Enable you to be alerted to problems continuously monitoring the system.

Where do I start?

MyCalls, like any sophisticated software application is very configurable. To make full use of your investment in this software you will need to plan how you are going to use it for maximum effectiveness. To make this easier we have compiled this introductory section to help you get the most from the application.

To make decisions regarding which information will be of most value you need to match up the MyCalls capabilities to your business activities. Obviously a small sales business will have very different requirements to a large call centre. This introductory guide will help you make decisions as to what information is of most value to your particular business.

Firstly we will look at the types of business activities you may be involved with and then point you toward the features of most benefit to you.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What do I want to improve
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Complaints handling
Generating New business
Staff focus
Customer retention
Fast response
Company image
Campaign Management
How do I organise my phone system to get the best from a call manager system
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What type of business are you in ?
Mainly Incoming
Service oriented
Enquiry/Support
Emergency Service
Legal/Financial
Both
Call Centre
Retail/Wholesale/ Dealer
Travel/Estate Agencies
Mainly Outgoing
Tele Sales
What type of organisation do I have
Are your staff multi skilled filling various roles
Are your departments geared around specific roles
Highly skilled staff
Do you need to retain details of call content
Finding calls easily
Listening to recorded calls
Need to back-up call recordings
Do you have out of hours requirements
Provide and Auto attendant but I need to ensure we respond to the calls during office hours
We provide an emergency out of hours service
Is your business centralised or distributed
Home Workers
Combination
OTR Sales force
Central office
Multiple Branches

Handling Incoming Calls

Incoming call handling is focused around responsiveness. The first step is to formulate a telephone management strategy which takes into account the following major criterion:

- What are your call volumes
- Do your staffing levels reflect demand
- Who answers your calls
- How quickly are calls answered
- How long does an average call take
- Can you tailor your resources to adapt to varying demands
- How long will callers wait for a call to be answered and why
- Can you differentiate between callers

Generating basic information about call volumes

MyCalls can generate information to enable you to answer these and many other questions. Starting with the measurement of call volumes MyCalls can provide you with all the relevant data. Once you have that information you can begin to formulate a call handling strategy, defining target answer times and call handling times. This information in turn will allow you to formulate service level values for each part of your organisation.

Grouping calls and devices

At this point you will need to break down your call handling into relevant groupings. Your organisation will probably already contain predefined groups of people handling the calls either by location e.g. first floor, second floor, or more likely by service function such as sales, purchasing, accounts etc. MyCalls allows you to create groups based around the type of device such as an extension.

You can group together several 'devices' and view the data in real time on screen or generate a report showing how that group performs over a period of time.

This is grouping at its simplest level and MyCalls supports several 'devices' all of which can be looked at individually or as grouped devices. Each type of device allows us to look at the same call data but from a different viewpoint.

Adding flexibility with Users

You can also look at the call data from a user's perspective where each user performs a role within the organisation. Users can be organised into groups which reflect the organisation's real hierarchy and provide more flexibility than devices alone including the ability for a user to log into any extension (hot desking) and the ability to control the access to call recordings.

Using DIDs to recognise purpose of calls

Breaking down calls according to the purpose of call can be achieved by providing DIDs to your callers. Advertising campaigns often use this approach where a series of DID numbers are advertised, each number corresponding to a different advert or product range. The phone system can then route calls coming in on a given DID to a specific group of extensions or an ACD queue. If several calls dialling the same DID are waiting to be answered they are defined as being in a DID queue and MyCalls can provide statistics about these queues such as calls waiting in queue, longest wait, who answered the calls and what the call durations were etc.

Managing calls using Automatic Call Distribution (ACD)

ACD allows the distribution of calls to a group using a set of rules and generally ensures that calls are spread around in a fair and even manner. This ensures that no individual agent is answering calls more frequently than others. MyCalls can monitor the performance of ACD queues and break down call rates (the number of calls in a given period) and performance such as time to answer and service levels.

Agent control allows supervisors to manage which agents are logged on to which queues at any given time and allows the monitoring of call queues and agents in real time.

Real time status and statistics

MyCalls provides a range of real time status screens which allow agents and supervisors to see what the current state of the phone system is. This can tell you information such as who is currently busy

on calls, how long calls have lasted, who is logged on etc. You can also see queue status for DIDs and ACD queues i.e. how many calls are in queue and longest wait in queue etc.

This kind of information gives an immediate snapshot of the system but for more meaningful information you will want to see statistics for the current hour or day or an hourly breakdown of the various performance parameters and call rates over the last 24 hour period. This is provided by a variety of real time statistics screens which can take the form of single value windows showing for example 'the number of abandoned calls today' or bar graph representations of the number of calls per hour.

These statistics can be viewed either as individual statistics such as a specific extension or can look at the statistics for one or several groups of devices, users or queues.

Developing your strategy using Reporting

Real time information is great for immediate day to day management but to develop a successful call management strategy you need to have much more comprehensive historical information available. MyCalls reporting gives you a library of reports ranging from call metrics per individual device or user to group statistics and time profile information which breaks down information into what happened at any half hour interval on any given day.

If the standard reports are insufficient for your needs you can generate custom reports where you define exactly what information is included in the report and the parameters are wide and exhaustive.

Your reports can be filtered to specific groups, call types, DIDs, ACD groups in fact almost any combination of call information can be defined within your filter to give you the exact information you require.

You can save your customised reports for later use and you can even schedule the reports to run at regular intervals. Scheduled reports give you the added advantage of being able to automatically distribute the reports to relevant people within the organisation.

Management by exception

One very big feature of MyCalls is the management by exception. This allows you to set up a series of rules which if broken create an alarm or alert informing you of the fact. These alarms can be used to indicate a wide variety of events and conditions such as:

- Trunk lockup
- IT System related issues
- Toll Fraud and telephone misuse
- Reduction in service levels
- Excessive call costs being incurred

There are many more available but ultimately this means that you can set up MyCalls to inform you when there is a problem and relieve managers of the need to continuously monitor the system themselves.

The next step

Once you have your call data you will be able to see how various aspects of your organisation are performing and you can use this data to refine and reformulate your strategy and fine tune up your operating parameters. The first thing then is to measure your call volumes and see how well you are handling your calls.

Measuring current call volumes

When you first install MyCalls you will want to be able to use the data gathered to help quantify your current call volumes. Fortunately you do not need to do anything special to enable you to run meaningful reports.

The following examples refer to running of reports and display of real time statistics screens. The details of how these reports and screens are configured are covered in the relevant sections but this detailed knowledge is not required in order to follow these examples.

To make a useful forecast of call volumes you will need to know:

Total number of calls in a given period (say 1 month)

This can be derived from a *summary of all calls* report. If we run the report for incoming calls on all trunks and ensure that any transferred calls are consolidated* into single calls we can see the total number of incoming calls for the reporting period along with other useful data such as average duration of calls and average ring times.

*normally a call which is connected and then transferred to another extension would be counted as two calls. Consolidating would treat them as a single call.

Group Summary

Created On 21/11/2008 14:51:14

Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

Report Filtered To:

Only include call types: Incoming or Incoming Abandoned or Incoming Transferred.

Show summaries for the device type: Trunk

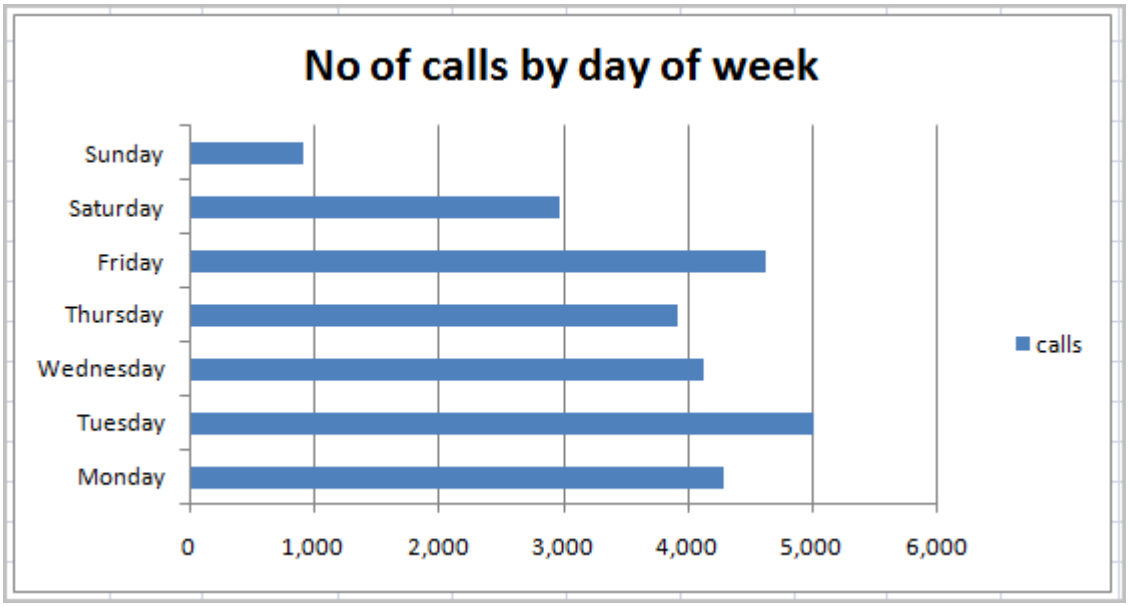
Transferred calls are being reported as a single call.

	Number of Calls				Average Duration		Average Ring Time		Num. Long		Short
Group	Ans.	Abd.	Out.	Tfr	Ans.	Out.	Ans.	Abd.	Waits	Calls	Calls
Head Office											
All Trunks	29,091	3,343	0	3,202	00:02:48	00:00:00	00:00:19	00:00:49	0	0	756

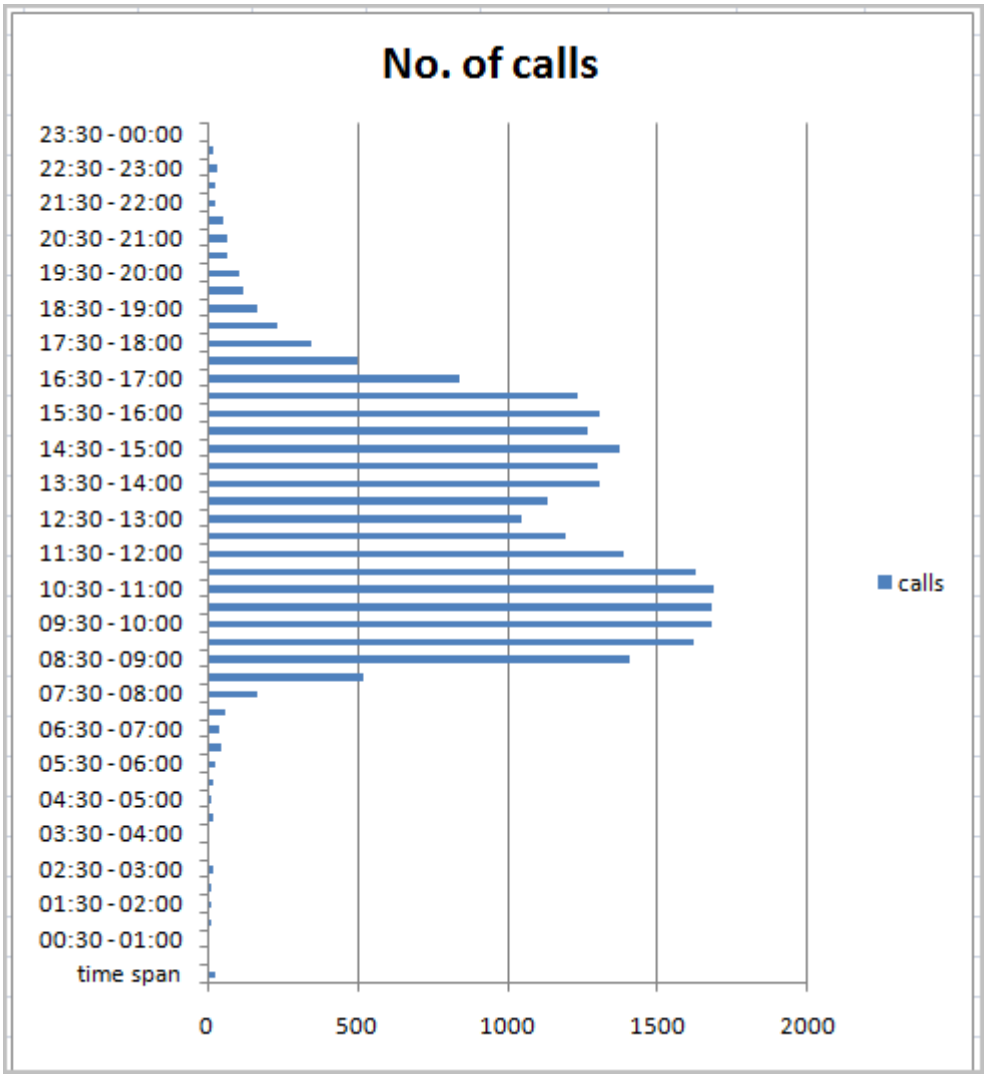
Call rates

Using time profile reports we can get a breakdown of call statistics for specific intervals during the reporting period. These intervals can show us how call rates vary for each day of the week or they can be very specific by analysing the call statistics for each Half hour of the day over the reporting periods. This particular report accumulates all the data for the respective intervals over the reporting period so if you were reporting on 'Day of week' the total calls for Monday would be the total calls for all Mondays in the period.

The following graph is compiled from an exported MyCalls report showing genuine data for 1 month of calls.



The next example shows the same 1 month period but shows the accumulated half hour of each day.



From the original group summary report then we can see we have to handle roughly 30,000 calls in a month of which about 3,000 (10%) are abandoned. From our time distribution reports we can see how these calls are spread over days of the week and how the calls are spread throughout the day. From this data alone we can start to estimate staffing levels and how these levels may need to be adjusted each day and throughout the day.

Trunk usage

Knowing the quantity of calls we need to handle and when these calls are occurring is a good start for us but to give the data a bit of context it would be useful to know what the trunk usage is. This helps us identify where we may be hitting bottlenecks due to insufficient trunks or conversely we may have far more trunks than we currently need.

The following screenshot is a portion of a trunk usage report for the same period as the previous graphs. This indicates the times of day when the most trunks are in use are between 10:00 and 12:00 and between 14:00 and 16:00. This ties in with our usage graphs above but we now also know how many trunks this may be using simultaneously in a given period. If this is approaching the maximum trunks available then we may have to factor that in when we produce a forecast to avoid unnecessary busy signals due to the trunks operating at maximum capacity.

Report Filtered To:
Only include PBX: Head Office
Only include trunk groups: All Trunks.
Summary of trunk activity arranged into time intervals of 1 Hour. Report ordered by: Utilisation

Interval Period	Maximum Trunks	First Time at Maximum
26/08/2008 10:00:00 - 26/08/2008 11:00:00	24	26/08/2008 10:19:56
26/08/2008 11:00:00 - 26/08/2008 12:00:00	25	26/08/2008 11:36:01
26/08/2008 16:00:00 - 26/08/2008 17:00:00	24	26/08/2008 16:46:51
18/08/2008 10:00:00 - 18/08/2008 11:00:00	27	18/08/2008 10:53:43
18/08/2008 11:00:00 - 18/08/2008 12:00:00	24	18/08/2008 11:31:46
18/08/2008 16:00:00 - 18/08/2008 17:00:00	23	18/08/2008 16:03:54
26/08/2008 09:00:00 - 26/08/2008 10:00:00	21	26/08/2008 09:11:12
27/08/2008 10:00:00 - 27/08/2008 11:00:00	22	27/08/2008 10:19:01
04/08/2008 15:00:00 - 04/08/2008 16:00:00	20	04/08/2008 15:50:39
04/08/2008 10:00:00 - 04/08/2008 11:00:00	26	04/08/2008 10:29:30
04/08/2008 11:00:00 - 04/08/2008 12:00:00	22	04/08/2008 11:55:46
06/08/2008 11:00:00 - 06/08/2008 12:00:00	21	06/08/2008 11:53:58
11/08/2008 10:00:00 - 11/08/2008 11:00:00	22	11/08/2008 10:34:59
11/08/2008 12:00:00 - 11/08/2008 13:00:00	24	11/08/2008 12:21:56

So far we have been able to develop a picture of

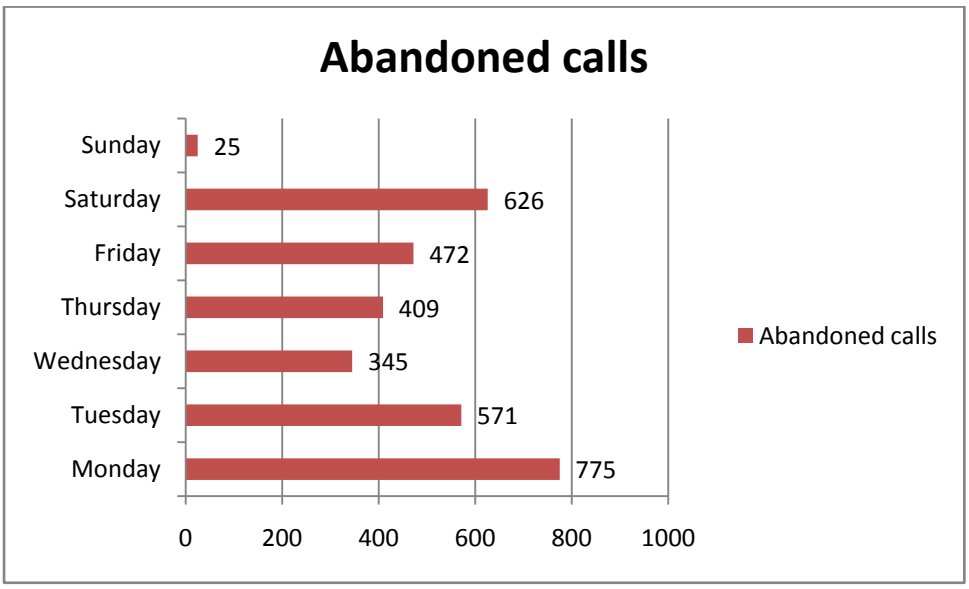
Peak call times

Trunk usage and capacity

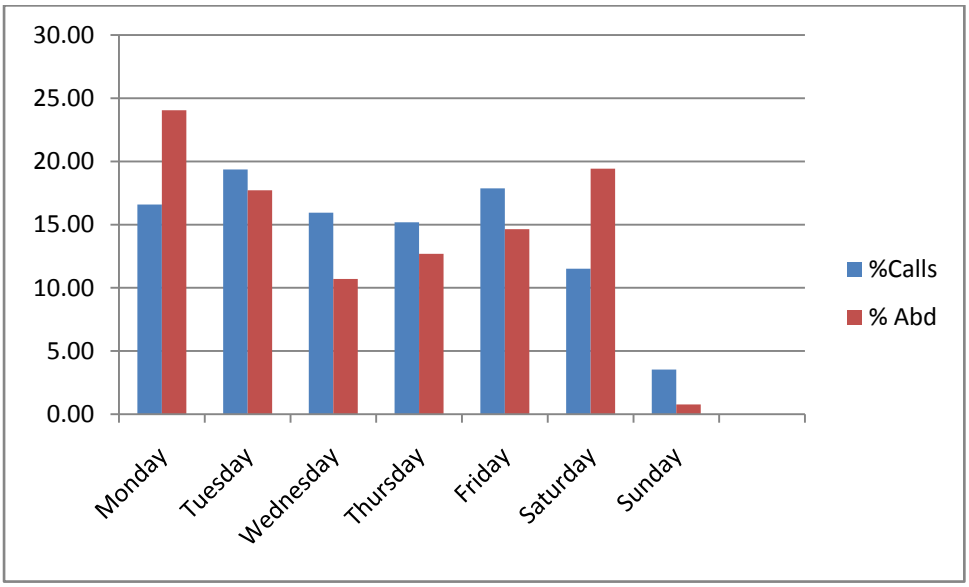
Busiest days and periods of the day

In addition we have figures for number of calls received and abandoned.

The 'Call comparison over the same interval' report allows us to compare different types of calls. Let's take a look at how the abandoned calls compare with the incoming calls overall.



Even from this basic data we can get a more detailed picture of events. An obvious observation would be that Saturday shows a high rate of abandonment whereas the call volume is one of the lowest. If we compare the two sets of data showing the values as a percentage of the total respective calls (calls each day as a percentage of total calls for the week) the comparison becomes clearer still. We can see for instance that Saturday has a high proportion of abandoned calls compared with the call volume for that day.



The reasons for this may be due to lots of factors but you can see that with this relatively basic information from a few simple reports we can begin to make predictions about our call volumes, caller behaviour, trunk requirements and agent activity.

Measure performance

What to measure

Looking deeper into the data by use of reports and real time statistical data we can begin to look at the information from differing perspectives.

System perspective

Trunk loading – how many trunks are required, when do trunks become overloaded resulting in busy signals.

Customer perspective

Wait times

Call duration

Call resolution (was the result of the call satisfactory)

Staff Performance

Number of calls answered

Number of calls abandoned

Time to Answer (TTA or ring time)

Average Time to Answer (ATA)

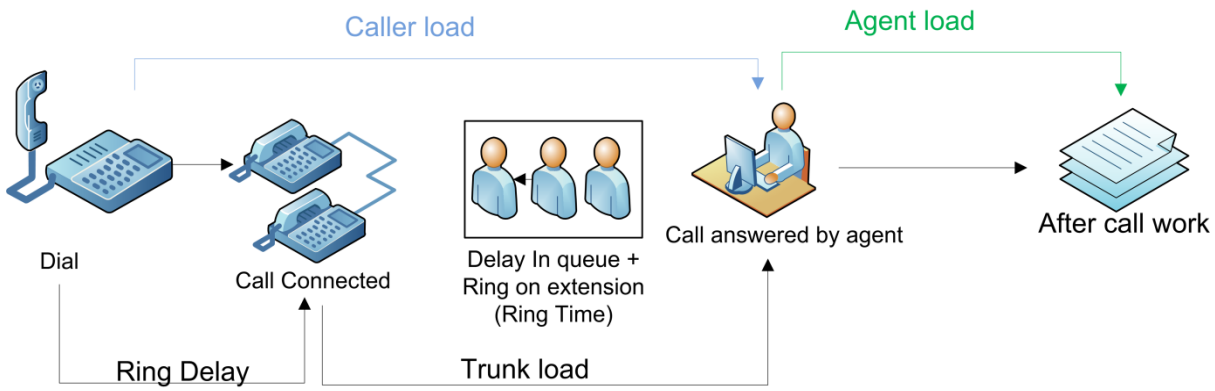
Service Level

Call duration

After call work

Breakdown of a call

Let's look at a diagram which represents the different stages of a call transaction.



The diagram shows a typical call which will have several phases

1. Ring Delay
2. Time in queue and/or Ring on Extension
3. Call talk time
4. After call work (Wrap-Up)

Ring delay is the time taken to initially answer a call. The length of this delay depends on the number of lines you have available and how the incoming calls are dealt with. If you are directing calls to an auto-attendant then the ring delay should be short and the caller can be given the opportunity to pre-select the department they wish to be transferred to. If the incoming call is directed straight to a queue or an extension (group) then the ring delay will depend on the number of available agents.

Time in queue is the delay experienced whilst waiting for the call to be picked up by an agent. There are a number of scenarios but essentially the call has been connected and you have been routed through to a queue. The delay in queue may be interrupted with announcement messages to help relieve the boredom factor.

Call talk time or call duration is the time the agent spends on the phone handling the call.

After call work is the time spent writing up the call afterwards. This is also referred to as *wrap-up* time.

There are several parameters we can measure, but the following are probably the most important:

Time to answer (TTA): Also referred to as Ring Time, this is the time taken for an agent to pick up a call once it has been connected to the PBX. This includes any time the call is in queue plus any ringing time on the extension

Average time to answer (ATA): This is the average TTA for an individual device or a group of devices.

Call Duration: The actual talk time of a call. The average duration can also be calculated

Time to Abandon: The time taken to abandon a call. The average time to abandon can also be calculated.

Service level

An absolute measurement such as Time to Answer (TTA) or Average Time to Answer (ATA) can give misleading results. This because the average time can be quite short but deeper analysis can reveal that some calls are taking far longer to be answered than the average value would suggest. It is not unusual to see ATA values of less than 20 seconds whereas the maximum time to answer can be in excess of 4 minutes. This can lead to a false conclusion that all your answer times are close to the average. To check the real TTA values you can run a 'Call Summary Time Distribution' report. The data shown below is an extract from such a report and shows the number of calls answered at various TTA's ranging from less than 5 seconds up to 240 seconds or more. Whilst the vast majority of calls occur in less than 35 seconds there are still quite a number of calls occurring at well over 2 minutes.

ATA (s)	calls answered
0 – 5	6,207
5-10	7,067
10-20	3,017
16 – 20	1,090
21 – 25	1,088
26 – 30	1,294
31 – 35	1,244
36 – 40	912
41 – 45	386
46 – 50	311
231 – 235	3
236 – 240	1
> 241	10

Using a service level value indicates the percentage of calls that are answered within the target answer time. This is a much better indicator than ATA because we can immediately see the percentage of calls which fall outside our desired answering times. We can report on Service level as well as setting alarms and viewing the values in real time on wallboards etc.

A basic definition of service level is:

$$Service\ level\ =\ X\ percent\ of\ calls\ answered\ in\ Y\ seconds.$$

This means If 90% of calls are answered within the target time to answer then the service level will be 90%. In order to set service levels you will need to analyse time to answer (TTA), abandonment statistics and call durations. However you will need to set realistic targets for these parameters and adjust them based on your ongoing results.

From the data shown in the table above* we can make a rough calculation that approximately 17,000 of a total of 23,000 calls fell within the 20 second answer time. This equates to a service level of around 73% which means that about a quarter of calls are taking more than 20 seconds to answer. MyCalls allows for considerably more accuracy in these calculations taking into account several other parameters.

*for simplicity the whole table of data from which the service level was calculated is not shown.

Valid calls and grace periods

When configuring service levels it is important to define what are considered to be valid ring times. If a call is abandoned very quickly it may be that the caller had misdialled or changed their mind about the call. These incidents should not be considered valid calls as it would be impossible to

answer them. To eliminate this kind of call from the statistics you can set grace periods. Grace periods effectively ignore short ring times when marking a call as abandoned.

What about the call durations? Again very short calls may indicate a caller has either misdialled or been put through to the wrong department etc. In this event we can define a minimum call duration below which the call is marked as a short call. Conversely we want to aim to complete calls within a specified period so we can mark calls lasting longer than a certain time as a long call.

These parameters are configured as part of the operations settings under grace periods and grade of service settings.

Reports to help with assessing your performance:

Group Summary reports show the total number of calls, ring times, durations, long and short calls etc for any period and any device group. Group Summary by Member reports, will show overall statistics but can break down the group statistics by the members of each group.

Call Detail reports will show a complete breakdown for each call and can be generated for all devices or limited to showing only certain groups of devices. This gives a call by call breakdown of activity so you would tend to use this report to home in on specific problems or areas of interest.

If you want more detail you can generate custom reports which are available for group summaries and call details and offer over 120 individual parameters.

User Availability reports can show agent activity. Agents can be in one of a number of states such as available, DND, wrap-up etc. Availability reports show the number of logins and duration of login, time spent in wrap-up, unavailable or in DND with average durations for each state. You can generate variations of this report which give a breakdown of unavailable codes. Availability detail gives a breakdown of the states for each user and availability profile reports show the maximum and minimum number of users in each state for a specified interval such as every hour.

Performance reports give breakdown of service levels at both group detail and group summary levels. Group details report the half hour periods where the service levels were not met. Group summaries provide overall statistics for the percentage of half hour intervals for which the grade of service targets were not met.

Real-time statistics

MyCalls can display a wide range of real time statistics which can be displayed on a desktop PC or wallboard display. You can organise your screens into pages and layout each page in any arrangement of statistics windows you like.

The statistics windows are capable of displaying either *status* – which is the real time state of an extension, user, queue etc or *statistics* - which displays accumulated values such as number of calls, service levels, and average call times, wait times etc.

Real time windows can be used to show current performance levels and call rates to motivate staff. You can show calls in queue which help staff to recognise when things are particularly busy and can empower staff to log themselves onto a busy queue to help relieve the load.

A guide to the statistics of most use in real time is as follows:

Calls in queue (CIQ) these are likely to be changing quite rapidly and is most sensitive to real time changes in agent allocation.

Longest current wait indicates the longest waiting call in the queue. This value in conjunction with the number of calls in queue can be a good indicator of current urgency. If the calls in queue are growing but the longest current wait is low then the call durations are probably low thus keeping the wait times down. If the wait times begin to increase then it may be indicating a downward trend and the need to increase the number of agents in order to clear the queue.

Service Levels, Answer times, Abandonment times. These can all be displayed in a single group statistics window.

Agent or Extension status. Shows the current availability of agents or extensions. On its own this is not particularly useful and needs to be displayed in context with the current queue status.

Real Time alarms.

These can be used to indicate a wide variety of conditions such as when queue sizes are growing, wait times are increasing or service levels are dropping and call rates exceed certain values.

How to group on different devices

Trunks

Examine overall usage of the phone system

Volumes of calls through different routes e.g. GSM gateway, ISDN, pots etc

Extensions

Fixed departmental stats

Breakdown by extension groups or individual extension

Pilot ACD queues

Analyse performance of ACD groups

How well does my ACD grouping work

Abandonment rates, durations, service levels

DIDs

Distinguish reasons for calling

Tune responses to calls based on call type

Set different service levels for different DIDs depending on how long a caller is willing to wait

Users

Can better reflect the organisation for reporting etc

Enables call recording rules

Agent control is possible, more control over ACD handling

Hot-Desking allows users to log onto different extensions and so tracks users across extensions

Supports subgroups such as sales/book sales or sales/music sales

Trouble shooting

Several reports and alarms are provided to help trouble shoot the phone system. Trunk reports allow you to analyse where certain trunks may be held in state for a long period, conversely if a trunk is not working correctly you can run an unused device report. You can run reports to indicate where extensions and other devices are unused. This may indicate wrongly configured devices. This is particularly important if those devices are enabled for real time statistics as this can use up a considerable amount of system resources.

Reports

Trunks

Status reports

System reports

Unused devices

Alarms

Alert you to problem areas

System – PBX activity and amount of disk space free

Usage/Performance/service levels etc

Emergency alarms indicate when emergency numbers are used

Call rates – set and monitor

Toll fraud and security

Trunk utilisation – alarm on the number of concurrently busy trunks

Device status – detects when devices are busy or free for extended periods or when an extension is off hook for an extended period

User status – detects when a user goes into wrap-up, DND, or unavailable a specified number of times or for an extended period

Queue status – detects when a queue (Trunk, DID or ACD) exceeds a certain length or the maximum wait time exceeds a specified period

Hunt Groups and ACD queues

Depending on the type of calls or volume of calls you may need to implement call queuing. You can use a queuing mechanism to attempt to keep callers on the line for longer using a mixture of tactics which include music on hold and injecting messages at regular intervals.

Call Routing can be implemented by the use of

- Hunt Groups
- ACD

Hunt Groups

Hunt groups are a rudimentary form of queuing where an incoming call is sent around a group of extensions. Incoming calls are allowed to roll over to the next available extension until the call is answered. The problem with hunt groups is that the logic is very simple and thus does not provide a particularly even distribution of calls across a group.

ACD

Automatic Call Distribution or ACD provides a number of queues programmed into the telephone system PBX. When a call comes in via a DID, Auto Attendant or Receptionist it can be routed to an ACD Queue (also referred to as a Pilot number in MyCalls). Logical rules for ACD routing attempt to ensure that agents are fed calls evenly in an attempt to spread the call load.

Agent Control

Agent control allows you to match your staff activities to the varying call volumes. You can manage logging staff onto ACD queues and monitor queue call statistics in real time.

Agent Control can:

- Log on and off queues
- Define which queues your staff can log onto
- Remotely log staff on and off queues
- Monitor your staff's queue activity and current status in real time
- Manage wrap-up times
- Unavailable codes give the reasons that staff are unavailable at specific times
- Generate queue usage reports
- Report on call activity based around ACD routing rules

Using DID numbers

It is useful to automatically route calls to extensions directly, whilst keeping the number of trunks to a minimum. This can be accomplished by the use of DIDs

DIDs allow specific inbound numbers to be routed to private extensions without the need for an auto attendant or a call transfer. DID is most useful on PRI or BRI trunks where several channels can be assigned as DID channels. In this way a single PRI trunk group could handle hundreds of phone numbers using only 30 channels or less. An office with 80 extensions could have 80 corresponding phone numbers operating on a single PRI trunk. The PBX knows which phone extension to ring because the DID tells the PBX which extension is associated with a given number.

Calls coming into DIDs can also be queued within the PBX. This allows a basic call queuing facility but does not have the advantages of intelligent routing offered by ACD. DIDs can be combined with ACD so that calls to a DID number are routed to an ACD queue.

For analysis purposes DIDs offer a number of benefits. Organising your incoming calls by DID e.g. having a unique number for each type of enquiry, will allow you to analyse caller activity based on the number dialled. You can assign different response requirements to different DIDs based around department staffing or how long you believe a caller will wait.

How long a caller will wait is dependent on a number of factors such as purpose of call, urgency of the call, time of day, time of year. Clearly a call to an emergency doctor service will wait longer than a casual enquiry.

You can analyse call volumes across different times broken down into DIDs to give you a picture of your caller's patterns of behaviour and then tune your response and staffing accordingly.

Follow up unreturned calls

It is inevitable you will miss some calls, but MyCalls enables you to ask under what circumstances and examine why you are missing calls. The most important issue however is when a call is missed, are you able to return that call. MyCalls automatically keeps a log of unreturned calls for you so that you can follow up missed calls.

Quick tip:

Before you start to develop a strategy to increase the length of time callers are prepared to wait you need to be able to measure your call volumes at different times of day, days of week and seasonality over the months of the year. All this can be done using a variety of reporting mechanisms which

Mycalls provides e.g. Call volume analyses, Line usage, DID analyses, call profiles over time of day, day of week etc, and these are all virtually one click operations using the built in report items, saving you time and effort to produce very in-depth information. Of course you may want to distribute these reports across the organization automatically using the MyCalls report scheduler.

Handling outgoing calls

Outgoing call metrics are clearly different to incoming. There are no ring times to consider and call routing is unnecessary.

Timing of outgoing calls is important. Picking the optimal times to make calls depends on customer behaviour and also availability of trunks from your PBX. To develop the optimal call patterns you can use MyCalls reporting statistics in a variety of ways.

Measure call volume and trunk usage

Profile Abandonment rates for outgoing calls on hourly and daily basis

Compare Abandonment with durations for hour of day, day of week etc

Analyse call duration / talk time for extensions within various groups. Longer call times can indicate that the extension is taking longer to close a sale

Look at average call durations and where specific calls are longer or shorter than this based on time of day and extension number etc.

MyCalls provides a single system that can consolidate call traffic information for each site and allow easy comparisons between them.

Out of hours operations

If you operate out of hours or need to handle out of hours calls in a special way, MyCalls can be configured to give specific reports on this data. Like the routing of calls to out of office extensions you may have to program the PBX to enable some of the features.

The ‘Out of Hours’ configuration may involve:

Forwarding calls at specific times

Voicemail routing

Monitoring special ‘out of hours’ numbers

Monitoring fraudulent use of extensions out of hours

Monitoring known Emergency numbers and their usage

What types of calls are being made out of hours, and can this be handled more economically? There may be a lot of mobile calls being made out of hours where an email would be just as effective and much cheaper.

Quick tip:

NB: The configuration for out of office calls will vary between different PBX systems and may require some specific PBX setup to achieve complete integration.

What do I want to improve on

MyCalls can be a central part of your strategy to improve many aspects of the way your business communications evolve. The phrase 'If you can't measure it, you can't manage it' applies particularly well to the management of telecommunications within an organisation.

Here are some suggestions as to how you can improve various business areas using MyCalls analysis:

Maintain available lines

MyCalls reporting capabilities can be used to optimize telephone networks by monitoring trunk utilisation. By reviewing detailed facilities usage reports you can determine if the telephone network is being used as expected. For example, are expenditures for facilities equipment and services in line with the income generated by their use? Or, can savings be obtained through more efficient use of these services?

MyCalls reports allows your business to determine the busiest hours and associated network usage. This information is essential to ensuring that employees always have access to outbound lines, and that customers can always reach support personnel.

Reduce costs

Analyse costing of Calls and Staff

Quantify Inter departmental calls, mobile usage, minimise fraudulent phone use

Staff focus and motivation

Generate and display real time statistics so your staff can see their progress throughout the day

Real time notifications let staff know where problems lie. For example calls taking too long

Regular posted reports showing weekly league tables or positive results gained

Complaints handling

Call recording can help improve complaints handling by listening to calls and working out ways of dealing with awkward customers or feeding back problems to product designers and sales staff

Call recording can be used to improve coaching and training of staff, hold regular call reviews and pick out good and poor practices. Develop a complaints handling procedure and ensure all staff are involved in developing this procedure based on real call experiences

Completion codes can be used to categorise the status of a complaint once the call has finished. These codes can be included in reports to analyse where complaints are handled successfully, are they passed on and dealt with and do you get back to the customer with a solution etc.

Use reports statistics to determine how quickly complaints are being dealt with and if complaints are being routed to the right staff. You may need to provide more DIDs so that more choices are presented to the caller prior to connecting to a staff member.

Manage returned calls by generating unreturned call reports or using the real time unreturned calls grid to ensure you are responding to these calls.

Generate new business, Improve customer retention

Use Call Recording to review call content

Use the statistical data generated from MyCalls to determine the best times to make specific types of calls. Experiment with different types of customer, your pitch and different times of day for the calls and use the resulting statistics in conjunction with call recordings to refine your campaign planning process

Scheduling regular calls to existing customers

Fast response to incoming enquiries

What type of staff do I have

The telecom strategy you employ for responding to calls can be very dependent on the type of staff you employ. If you provide a very specialist service or product that requires in depth knowledge then you will need to provide

- Multi skilled people filling various roles
- Departments geared around specific roles
- Highly skilled or technical staff

What type of business does MyCalls cater for

MyCalls can be configured to suit any size of business from a small 5-10 extension telesales business to a nationwide network of call centres. Mycalls has been deployed in virtually every market sector including:

Banking & Financial

Call Centres

Motor Sales & Car Hire

Insurance

Legal and Accounting services

Retail

Telesales

Brokerage

Hotel and Leisure

Doctors & Healthcare

Airports

Local Government

Schools & Educational

The following are just a few examples of how the software can be deployed to improve different business

Telemarketing Companies

In telemarketing organisations the sales or support results of individual employees can be compared to the number of calls completed. In addition, demographic data can be obtained from MyCalls by generating a custom report (custom call details) reporting on the locations (area codes) called in order to determine whether a specific telemarketing area is receiving too much attention or not getting enough.

Managers can also use call accounting reports to compare the amount of time employees are spending on the phone versus the number of accounts that are being served or the new business that is won.

DID reporting provide analyses of calls by the number used e.g. marketing companies, rebilling for customers.

Professional service

In most professional service organizations, employees are required to keep a manual running log of the time they spend on the phone with their clients, or on their client's behalf. Billing departments are then required to manually post the time and corresponding costs. With MyCalls, this entire process is automated. First, each active customer is assigned an account code, which is entered into the phone at the end of a telephone call and recorded by the call accounting system. Then account code or ad hoc reports can be run to verify the time spent on the telephone for that account.

Brokerage

Brokerage companies can use MyCalls to monitor the calling patterns of the sales staff, usually on a daily or weekly basis. Often, these call patterns are used in conjunction with a client's portfolio. If a broker has not made enough sales calls or is spending too much time with a client who has not purchased any stocks, a call this will be revealed. Another important use of MyCalls is the storage of historical call information. Suppose a client calls to order a particular stock and then the next day when the stock's value declines, the client denies purchase of the stock. For litigation purposes, companies can review the historical call records and retrieve a record of the actual call.

Misuse of the telephone system

Installation of MyCalls often has a significant effect on reducing employees' misuse of the telephone network. In fact, many companies see a large reduction in the number of personal telephone calls as soon as they make employees aware that a call accounting system is in use.

To detect toll fraud, MyCalls can be set up to alert you when certain criteria do not follow what has been defined as normal calling activity. Alerts can be sent remotely by email or can display an alert immediately upon completion of any call that seems suspicious. Having access to this information gives systems administrators the opportunity to take preventive measures.

You can use a variety of reports provided by a call accounting system to assist in managing employees. For instance, a manager can provide employees with a list of their calls on a daily, weekly or monthly basis. This list can help a manager determine if the employee is spending his or her time making business-related phone calls or excessive personal calls. Hopefully, it will also deter the employee from making personal long-distance calls at the company's expense.

Chapter 2

The MyCalls Software Suite

MyCalls Component Parts

MyCalls provides you with a complete set of Call Management facilities all in one package. The key features of the MyCalls system include the following components.

Call Logging Engine:

The heart of the MyCalls system is its call logging engine. Developed using the latest software technology it provides a modular call collection and processing engine which includes a persistent call data storage mechanism at each stage of the call logging process, thus minimising potential for loss of calls, even in the event of system hardware failure.

Display:

The comprehensive real time status and statistical windows available coupled with the ability to organise the screen displays into easily accessible screen pages gives you a convenient and very responsive view of the telephone system. You can allocate roles to agents which can limit the screens available to them and allows you to assign unchangeable layouts to users if required.

Call Recording:

Line-side call recording offers economical recording of all calls across an organisation. Recording is automatic and MyCalls matching algorithms are designed to provide maximum reliability whilst maintaining a flexible mechanism for applying recording rules to suit any organisation.

Billing:

A comprehensive call costing system allows complete billing of all call and associated handling costs to be configured. The billing system can operate worldwide and can handle most call types and costing scenarios.

Alarms:

MyCalls alarms manages the system so you don’t have to. It provides a huge range of alarm mechanisms for capturing and notifying almost any condition occurring within the system. This can include call durations, service levels, toll fraud, system failures, and ACD events to name only a few.

Alarms can provide a real time notification or can be distributed via Email or FTP to remote locations.

Reporting:

MyCalls Reporting is amongst the most comprehensive in its class. Reports ranging from call details and summary data, time profiles, trunk usage, alarms, audit events, system problems, departmental and organisational data can all be configured into regular reports. All reports can be distributed to remote locations and can be scheduled to run at any time.

ACD:

MyCalls ACD and Agent control gives you complete control over the management of ACD queues. It can show instant status of ACD activity on screen and you can control the login process remotely allowing supervisors to determine where and when an agent should be made available. Add to this the integrated Unavailable Codes and the ability to group users into different Agent Control groups and queues and you have a comprehensive system for ACD Management.

MyCalls Desktop:

As well as monitoring calls you can also make and answer calls using the screen controls available within MyCalls Desktop. Full call control is provided to allow easy access to complex operations involving hold, call parking and conferencing etc.

Screen-Pop:

Display the call details and related information regarding the person calling you so you are fully prepared to take the call and answer any questions immediately. Screen-Pop interfaces with a wide range of commercial applications and databases in the marketplace.

Chapter 3

MyCalls User Environment

Logging into the system

Before you can use MyCalls you need to log in to the system. Initially you will not have configured any users therefore you will be able to start-up the system without a user login so you can start with a blank login by just clicking 'OK' until users have been configured.

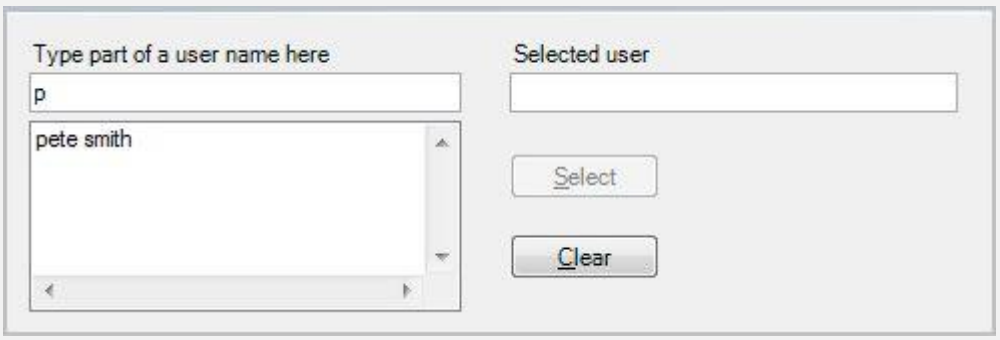
Logging into the system as a user requires that users with appropriate user types and passwords have been set up during the configuration of the application. For more details on this see the 'Organisation settings' section.

Normally a user will be associated with a default extension. If this is not the case then you will be prompted to select your normal extension as detailed below.

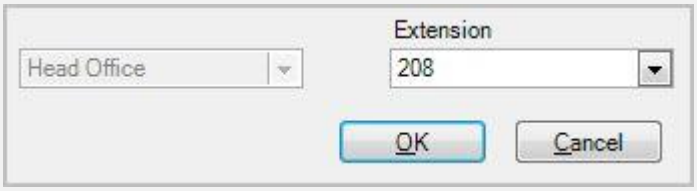
How To: Log into the system

1) Click 'User' and then 'Login'

2) Type in a name in User Name and type in a password, alternatively click 'Browse' to search for a name



3) The following screen will appear if there is agent control in the license and the agent has not logged into the ACD system.



4) Enter the extension that you are working from.

5) Click 'OK'

Quick tip:

At least one PBX administrator must be defined in the configuration otherwise you can't create or alter any other user.

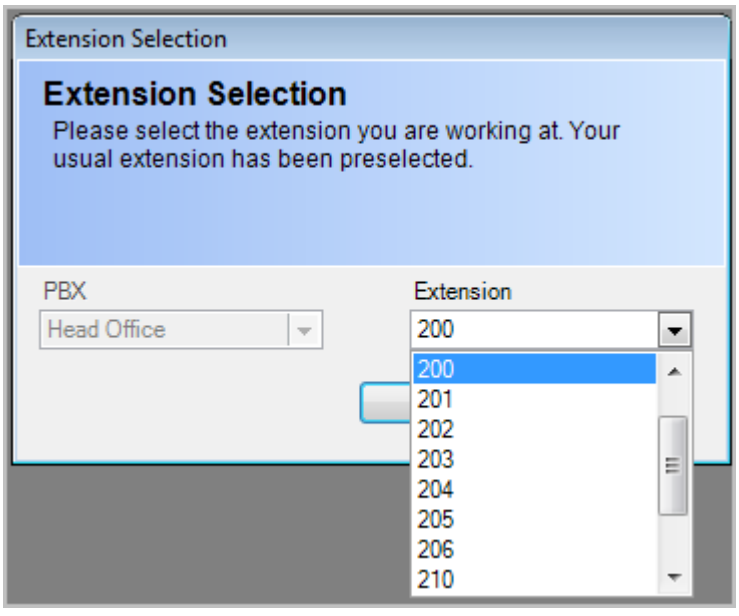
Selecting your extension when logging on to MyCalls

MyCalls now offers users a hot-desk facility. This enables a user to log onto any extension of their choice. Users must be specifically enabled for hot-desking otherwise they will be restricted to their default extension. In addition, extensions enabled for hot desking will appear in the list of available extensions as well as any extensions for which the user is marked as the default user when the user logs on to MyCalls or MyCalls desktop.

To Summarise:

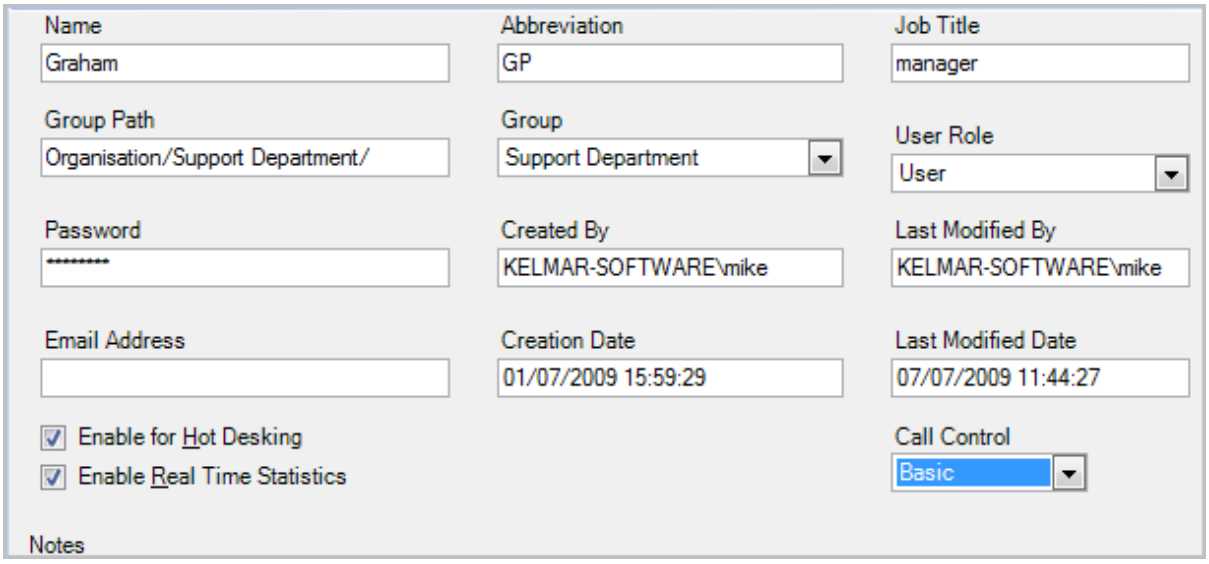
- Only Users enabled for Hot Desking can select an extension other than their default
- Any Extensions enabled for Hot Desking will appear in the list of available extensions when logging on as well as the extensions for which the user is the 'default' user

Once the hot desking options have been enabled for both users and extensions then the user will be presented with the extension list whenever they log on to MyCalls.

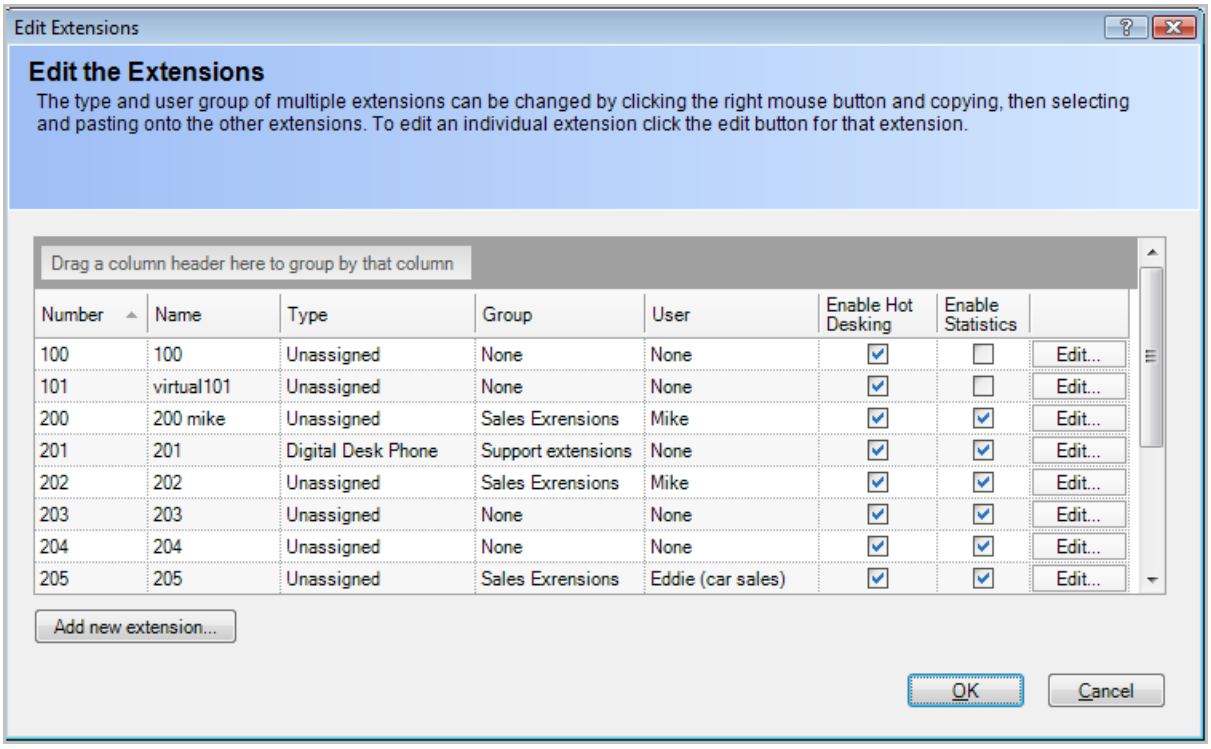


The user should select the extension that they wish to control which will then be the extension controlled from the call control toolbar etc.

Users can be enabled for hot desking in the user configuration dialog.



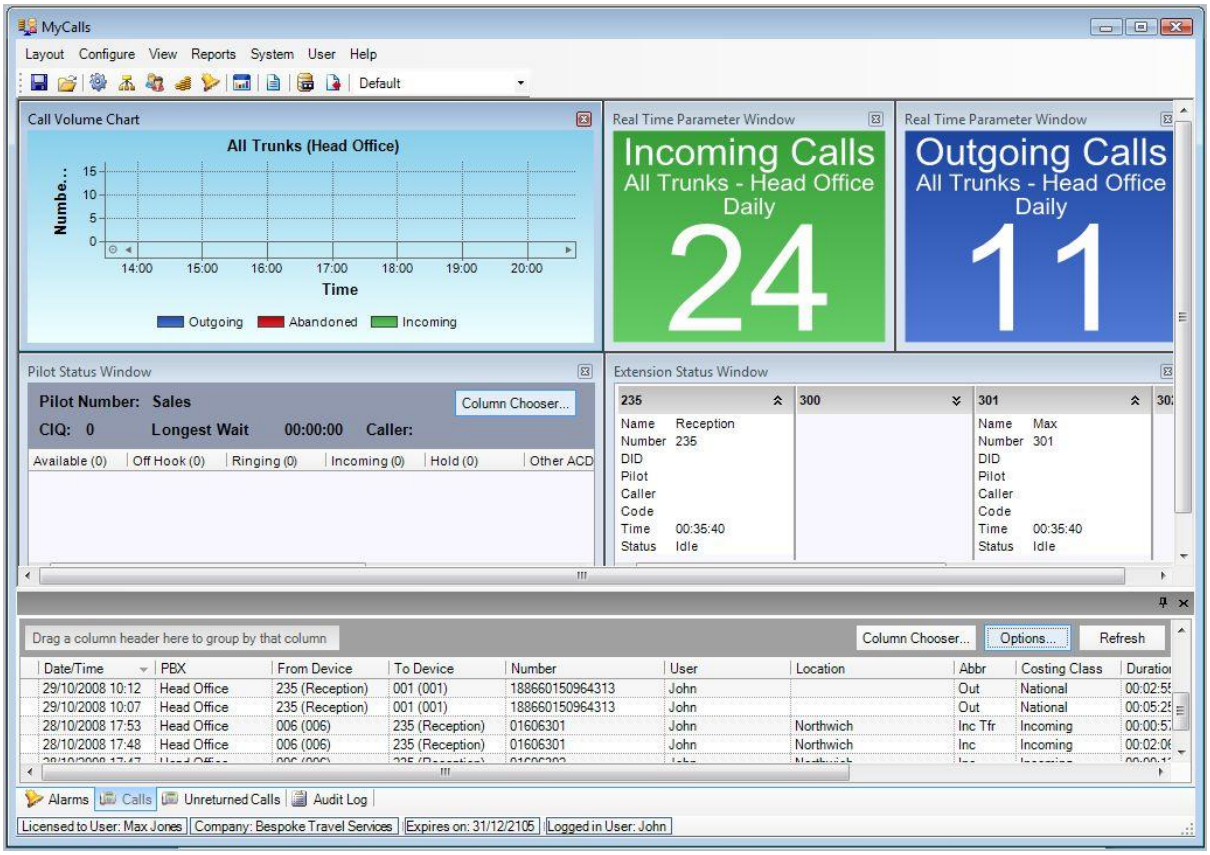
Extensions can be enabled for hot desking in the extensions configuration dialog.


Edit Extensions
Edit the Extensions
The type and user group of multiple extensions can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other extensions. To edit an individual extension click the edit button for that extension.
Drag a column header here to group by that column
Number
Name
Type
Group
User
Enable Hot Desking
Enable Statistics
100 100 Unassigned None None Edit...
101 virtual101 Unassigned None None Edit...
200 200 mike Unassigned Sales Exrensions Mike Edit...
201 201 Digital Desk Phone Support extensions None Edit...
202 202 Unassigned Sales Exrensions Mike Edit...
203 203 Unassigned None None Edit...
204 204 Unassigned None None Edit...
205 205 Unassigned Sales Exrensions Eddie (car sales) Edit...
Add new extension...
OK
Cancel

For more details on extension configuration see the device configuration section.

The Main Display

The main screen for MyCalls can display any combination of real time information windows you wish to create in any position. In addition to real time windows you can also view call logs and other information from the Grid Bar at the bottom of the screen.

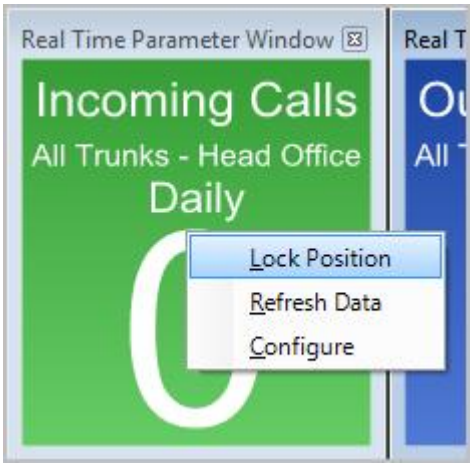

MyCalls
Layout Configure View Reports System User Help
Default
Call Volume Chart
All Trunks (Head Office)
Time
Outgoing Abandoned Incoming
Real Time Parameter Window
Incoming Calls
All Trunks - Head Office
Daily
24
Real Time Parameter Window
Outgoing Calls
All Trunks - Head Office
Daily
11
Pilot Status Window
Pilot Number: Sales
Column Chooser...
CIQ: 0 Longest Wait 00:00:00 Caller:
Available (0) Off Hook (0) Ringing (0) Incoming (0) Hold (0) Other ACD
Extension Status Window
235 300 301
Name Reception
Number 235
DID
Pilot
Caller
Code
Time 00:35:40
Status Idle
Name Max
Number 301
Drag a column header here to group by that column
Column Chooser... Options... Refresh
Date/Time PBX From Device To Device Number User Location Abbr Costing Class
29/10/2008 10:12 Head Office 235 (Reception) 001 (001) 188660150964313 John Out National
29/10/2008 10:07 Head Office 235 (Reception) 001 (001) 188660150964313 John Out National
28/10/2008 17:53 Head Office 006 (006) 235 (Reception) 01606301 John Northwich Inc Tfr Incoming
28/10/2008 17:48 Head Office 006 (006) 235 (Reception) 01606301 John Northwich Inc Incoming
Alarms Calls Unreturned Calls Audit Log
Licensed to User: Max Jones
Company: Bespoke Travel Services
Expires on: 31/12/2105
Logged in User: John

Common features of real time information windows

The windows visible on the MyCalls main screen are individually configurable. Depending on the type of screen they may have a number of options available.

Status and statistics screens all have the option to lock, Refresh and configure using the context menu which is viewed by right clicking the mouse whilst hovering over the window.

Using the mouse you can hover over any real time window and press the right mouse button to get a menu of window options.



The single parameter window menu has the following options available.

Lock Position

This allows you to lock a window in place on the screen layout so that it can no longer be re-sized or moved.

When a window is locked it loses its borders and if you right click on it again you will see a tick next to the Lock Position option. To unlock a window select the Lock Position option again to remove the tick and display the windows borders again. You should now be able to resize and move the window.

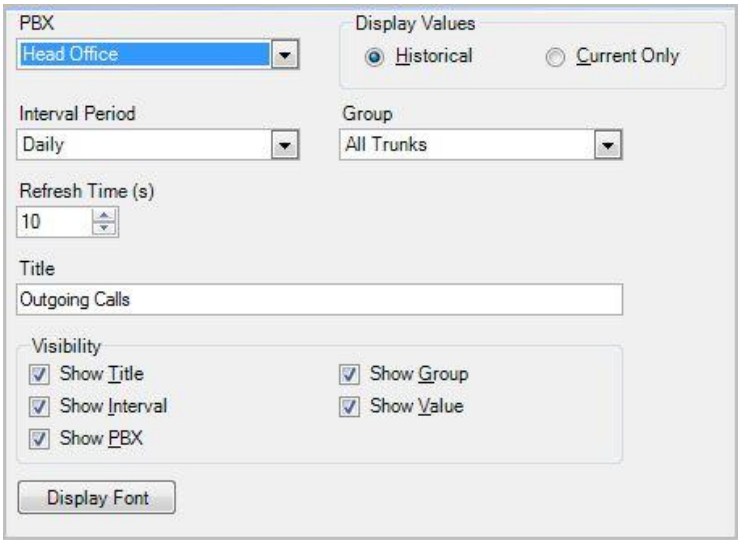
Refresh Data

Data is automatically taken from the database at prescribed intervals

You can select the refresh data option to force the data of the window to be updated. This will force a retrieval of the data.

Configure

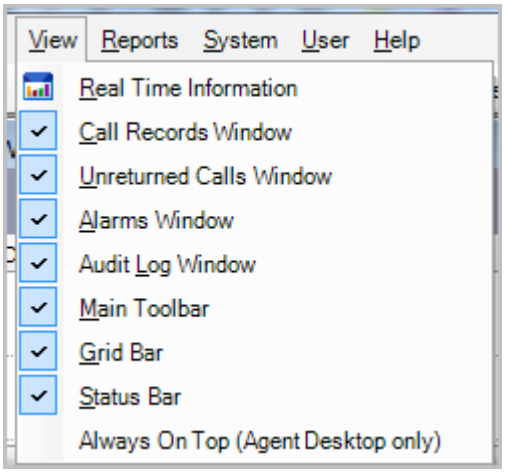
This option allows you to configure existing window settings. The actual dialog presented will depend on the window type displayed. (See 'real time window configuration' for more details.)



The View Menu

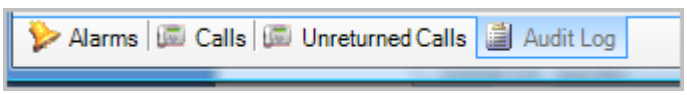
The MyCalls main screen provides a blank area onto which you can arrange various real time windows. In addition to the Real Time windows you can also view popup windows to allow easy access to the various logs which are recorded within the MyCalls database. These Log windows include Calls, Unreturned calls, Alarms and Audit logs.

To access the log windows you can either select from the View menu where you will see selection checkboxes to show or hide the various log windows. Selecting either Call Records, Unreturned Calls, Alarms or Audit Log makes the associated window visible on the screen.

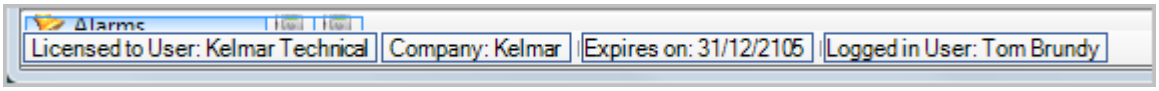


In addition to the logs you can also enable the viewing of the main toolbar below the main menu at the top of the screen

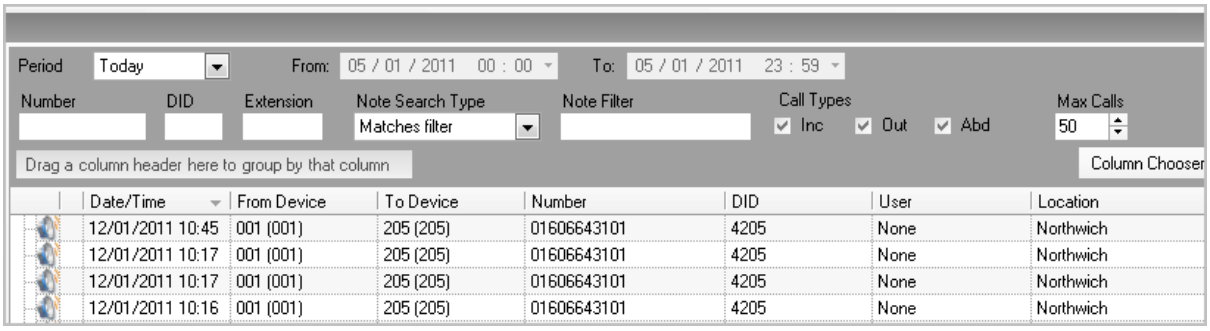
The Grid bar at the bottom of the screen



The Status window found at the bottom of the screen.



Grid views



The main call log windows are viewable as grids. The standard grids are Calls, Unreturned calls, Alarms, Audit Logs. These grids share the following features

View the grid: Positioning the mouse over the appropriate icon in the bottom grid bar will cause the window to pop up.

Pin the Grid: Allows the grid to be fixed in position by selecting the Pin icon to the top right of the window.

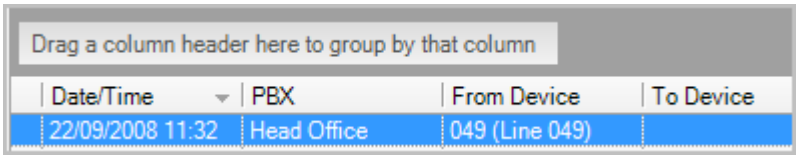
If the grid is not pinned then it will automatically hide (minimise) when the mouse is not positioned over the window.

The window can be adjusted in height by hovering over and clicking the upper part of the window with the mouse and then dragging the window vertically.

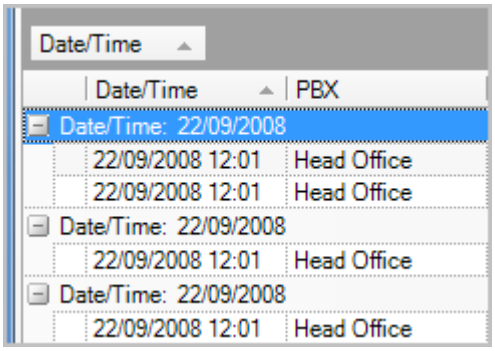
Adjusting the column width: Dragging a column divider with the mouse allows the column to be sized horizontally

Ordering by column: Selecting the column title will cause the grid to be ordered by that column's content, e.g. clicking on a number column will sort the contents in ascending numerical order, clicking on a name column will sort the items in ascending alphabetical order of the name column.

Grouping by column: Dragging a column to the grouping area (*Drag a column header here to group by that column*) will group records on that column. To ungroup simply drag the column name outside the window.



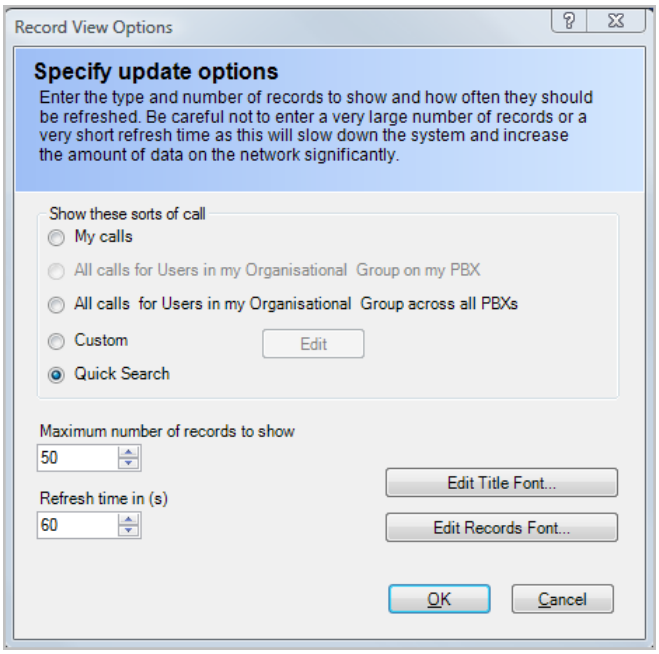
The screen shot below shows grouping by the date-time column



Column Chooser: Allows the grid to be customized by adding and removing different columns. Top add a column select it from the column chooser list and drag it to the grid. To remove a column, drag it from the grid and release the mouse button. To move the position of a column, drag the column horizontally along the grid.

Grid View Options

Clicking on the options button allows you to display the following options:


Record View Options
Specify update options
Enter the type and number of records to show and how often they should be refreshed. Be careful not to enter a very large number of records or a very short refresh time as this will slow down the system and increase the amount of data on the network significantly.
Show these sorts of call
My calls
All calls for Users in my Organisational Group on my PBX
All calls for Users in my Organisational Group across all PBXs
Custom
Edit
Quick Search
Maximum number of records to show
50
Refresh time in (s)
60
Edit Title Font...
Edit Records Font...
OK
Cancel

My calls only**:** This displays only calls related to the user currently logged onto the system.

All calls for users in my Organisational Group on my PBX: Lists all calls for users in the logged on user's group but only includes those extensions connected to the local PBX.

All calls for users in my Organisational Group across all PBX's: Lists all calls for users in the logged on user's group irrespective of the PBX the extension is connected to.

Custom**:** Allows setting of specific period for calls. This can be a date range and can be further limited to a specific time period during each day. Extensions, DID filters etc can also be applied.

Quick Search Filtering: Set the grid filtering using the quick search fields.

The Calls View

The calls visible in the calls view have some special features.

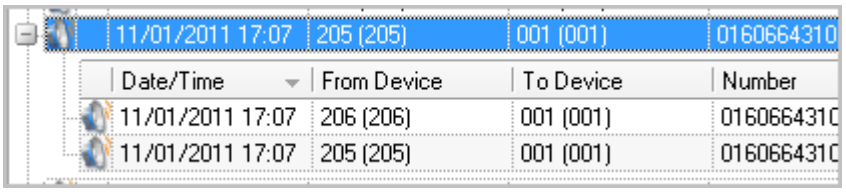
Call Playback

A speaker icon against a call indicates the call has been recorded, double clicking on the speaker icon will playback the call.

Multiple call legs

If the call includes transferred legs then the call will have an expansion symbol

indicating the call can be opened up to reveal the individual legs of the call.



For multi-leg calls a summary call is displayed at the outer level and each of the legs of the call (transfers) at the inner level. If a summary call has been filtered out (usually by extension) then call legs will appear at the outer level and may NOT be grouped together.

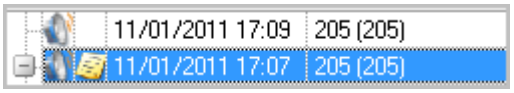
Normal calls without transfers will appear at the outer level .

The layout of the call record view is incompatible with versions prior to MyCalls R-3.0.0.0. This means that when upgrading from an earlier version the call record view layout will be set to the default layout.

Using Call Notes

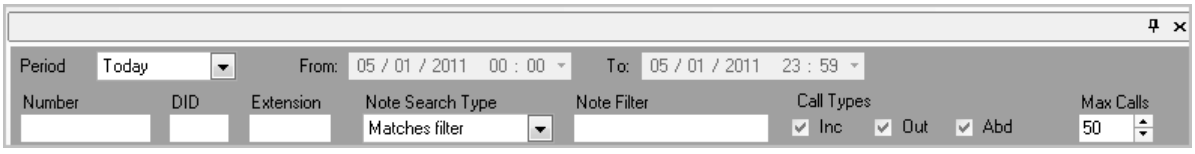
Notes can be added to a call and notes do not require call recording in order to be used. To add a note right click on the call and select 'Notes'. The Notes entry dialog will be displayed. You may then type in your notes and click 'Save'. A note applies to a complete call, you cannot enter individual notes for each leg of a call.

Once a note has been added to a call this will be indicated by a notes icon. Double clicking this icon will open the note dialog allowing you to add further notes to the call.



Notes are also available as a selectable column from the column chooser.

Using Quick Search



Quick Search fields can be used to search by Number, DID, Extension, Call type, Date/Time. Results must meet all criteria in the filter so be careful not to leave anything in the Number box if you are

only searching for calls related to an Extension as any calls returned in the grid would need to match both number and extension.

Searching for calls using the Notes filters

Quick search can also use the notes field. The Note search type can be set to one of the following:

Matches Filter: Finds all notes where the note contains text matching whatever has been entered in the Note Filter textbox.

Has a note: Finds all calls which have a note attached.

No Note: Finds all calls with no note attached.

If the filter is set to 'Matches Filter' then set the 'Note Filter' box to the search word or phrase within the notes attached to the calls.

Max Calls: Limits the number of calls viewable in the grid up to a maximum of 500. It is recommended that this is kept to a maximum of 50 calls for normal operation to limit the loading on the database.

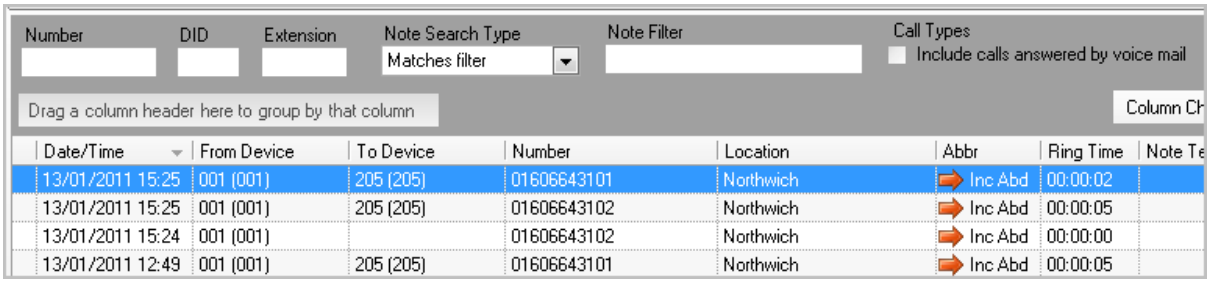
Refresh: allows you to manually refresh the calls in the view.

Unreturned Calls View

Unreturned calls are calls where the caller has abandoned and not been called back. The unreturned calls are automatically updated when a call is abandoned. Calls are automatically removed from this view when either:

A call is returned

The same caller calls again and the call is answered



Unreturned calls can be searched using a quick search panel. This quick search allows you to search by number, DID, extension and notes

Unreturned calls can also be displayed in a real time status window – See Real Time Status

Exporting Unreturned calls

Right clicking an unreturned call or multiple unreturned calls allows you to export the list of unreturned calls either to a file, clipboard or an email recipient.

Chapter 4

Screen Layouts

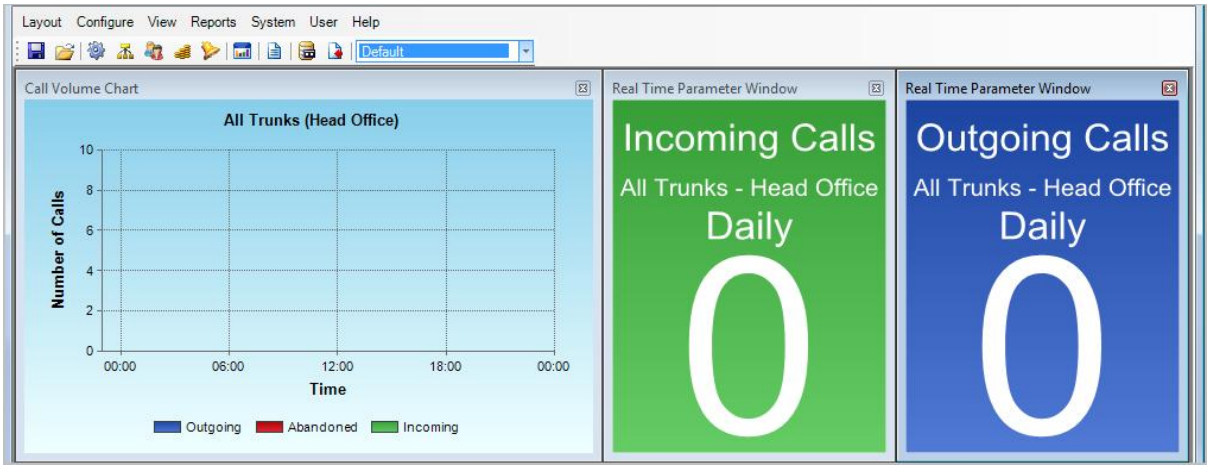
Introduction to Layouts

Layouts are the view of MyCalls that you see when you run the application. A layout is made up of pages. A page contains a particular arrangement of parameter windows and can be stored under a specific page name as part of a layout. Changes to the arrangement of a given page is automatically stored and recalled when the application is closed and reopened.

Layouts (along with their pages) can be saved as public layouts.

Pages are normally arranged so that parameter windows relating to a particular set of information can be grouped and viewed together without the screen becoming overburdened with unnecessary information. This is especially useful if for example you want to create a grouped view of departmental statistics.

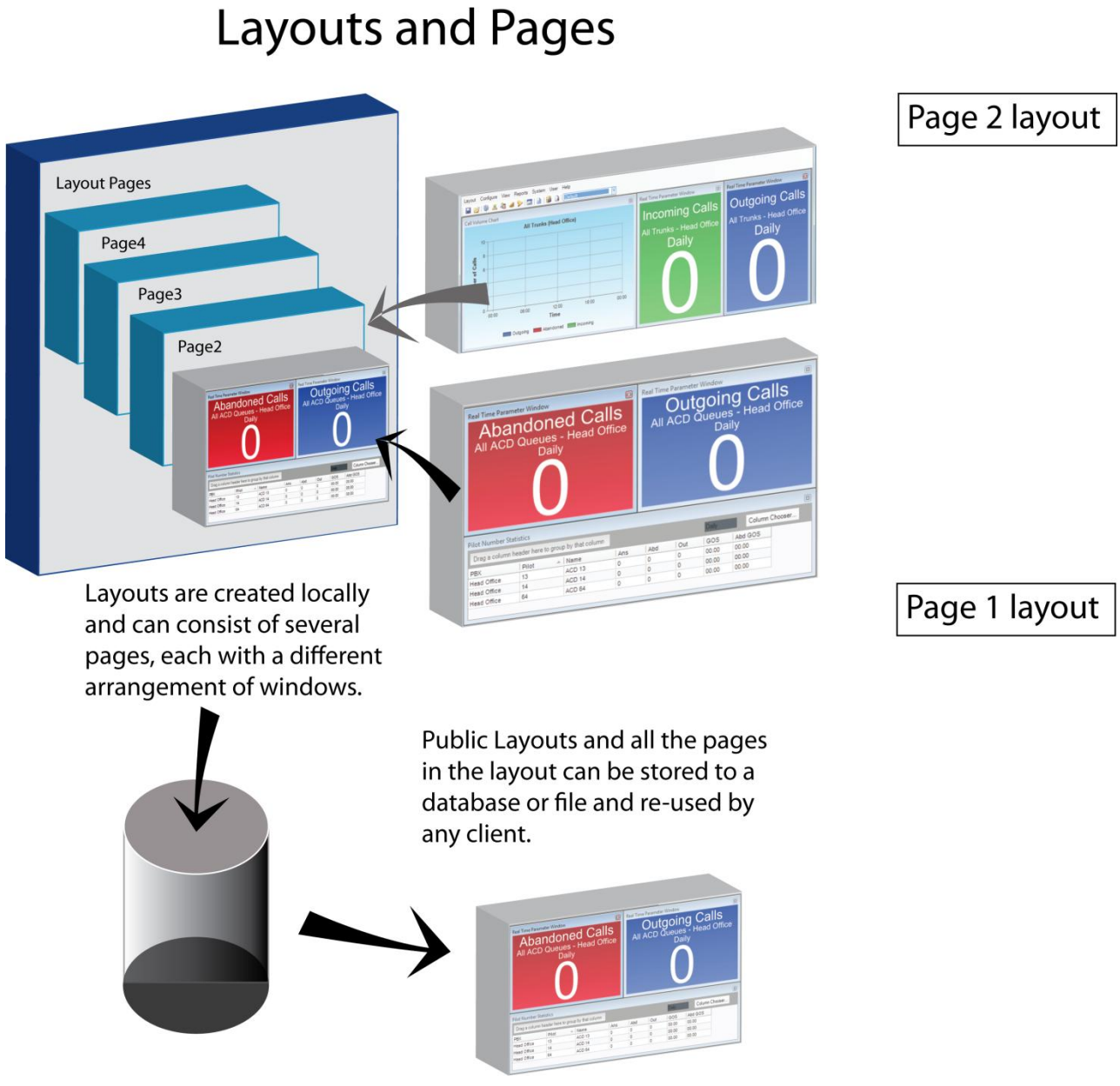
Other elements of a layout which you can customize are the toolbars displayed on screen. You can choose to hide or display the main toolbar, grid or status bars. The MyCalls window can be repositioned on your desktop and resized so that the next time you open the application it recalls these settings and positions itself accordingly.



Public and Local Layouts

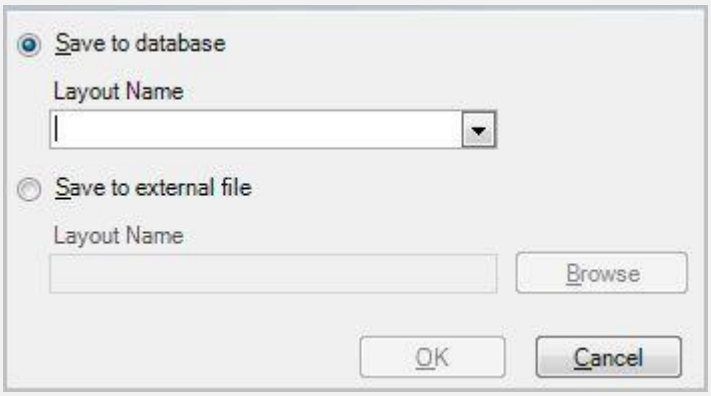
Local layouts are views that you create on your local machine. They viewed only on the computer on which they were created

To share your layout with other users you need to save it as 'public' in a location accessible by other users in the MyCalls database. Should you wish to share the layout with users on other sites or create a layout for general distribution then you can save the layout to a disk file. Agent Desktop users cannot open public Layouts or create their own layouts as they have a layout pre-assigned to them.



How To: Saving a public layout

1) You can save screen layouts as public layouts in either the MyCalls database or to an external file. This means that other users can load it and use it as a starting point to create their own layout.
2) When you have finished configuring your layout as you want it be viewed, from the Layout menu select 'Save Public'.



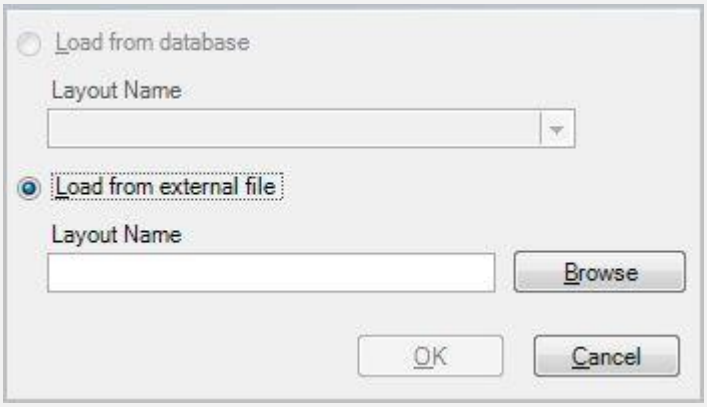
3) You have two options for saving your layout. You can either save it in the MyCalls database or you can choose a location on your computer or network and save it as a layout file (.lay file extension).
4) To save to the MyCalls database select the option 'Save to database' and the Layout Name drop down list will become active. Enter a new name for your layout to be identified by the system. If you wish to overwrite an existing layout in your database then select an existing item name from the list.
5) To save your layout to an external file select the option 'Save to external file' and the Layout Name field below will become active. Enter a path into the field manually or click the 'Browse' button to select a location to save your file to. Enter a name for your file in the File Name field as shown in the image below and then press the 'Save' button to return to the Save Screen Layout window.
6) When you have entered the required information to save your layout press 'OK'

Once saved a layout can be reopened and used as the current layout. Opening a public layout simply creates a local copy of the layout which you are then at liberty to change. The changes you make to your local copy do not affect the original public layout in any way.

How To: Opening a Public Layout

1) You can load a public layout that a user has saved to either the MyCalls database or an external file. Opening a layout will permanently overwrite your current screen layout. All user types except AGENT DESKTOP users can open public layouts.
2) If you are not a AGENT DESKTOP user then you can open a previously saved Public Layout from either a server or client machine.
3) From the Layout menu select the option 'Load Public'.

4) The Load Screen Layout window will be displayed. If there are layouts saved in the MyCalls database then the Load from database will be selectable but if there are not then you can only load a layout from an external file.



5) In the Layout Name field manually enter the file path to the layout you want to load or alternatively use the 'Browse' button to locate the file from your computer or network location as shown below using the 'Open dialog'.

6) When you have located the layout file press the 'Open' button to return to the Load Screen Layout window and then press the 'OK' button to load the layout into the MyCalls window.

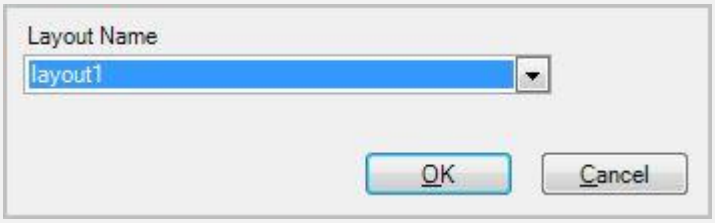
You can also delete public layouts if required. This only affects the public layout and has no impact on any other layouts which may have used this public layout in the past.

How To: Deleting a Public Layout from the Database

1) You may delete a screen layout from the MyCalls database so that it can no longer be loaded by other users. Users that have previously loaded a layout before it is deleted will not be affected.

2) To remove a saved public layout from the MyCalls database, select from the Layout Menu the option 'Delete Public'.

3) You will be displayed with the Delete Screen Layout window.



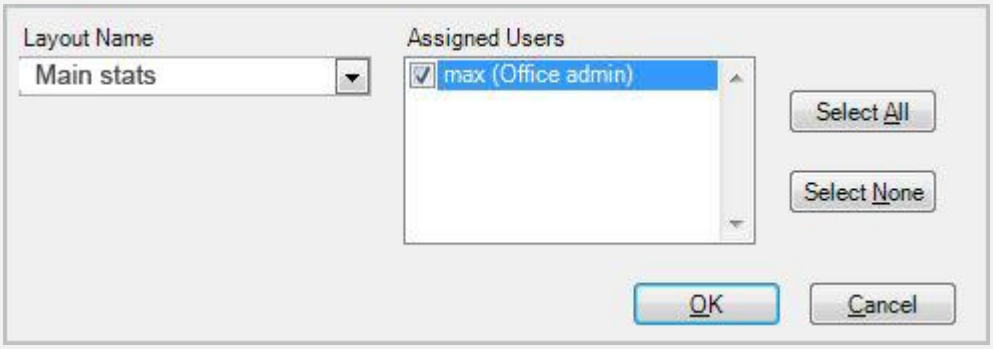
4) From the Layout Name drop down list select the name of the saved layout you want to delete.

5) Press 'OK' to delete the layout from the database. You will be prompted to confirm the deletion process, to confirm press 'Yes' or to cancel press 'No'.

Agent Desktop users have very limited access to MyCalls features and have no control over the layout. An Agent desktop will be assigned a layout by the supervisor and that layout will appear on-screen as soon as the application is launched and the agent has logged in.

How To: Assign a Public Layout to an Agent Desktop User

1) You can assign screen layouts to Agent Desktop users. This means that the next time these users log on, they will view the layout assigned to them. The Agent Desktop users are unable to modify the layout.
2) To assign a layout to an Agent Desktop user select the 'Assign' option from the Layout menu.
3) The Assign Screen Layouts screen will be displayed.

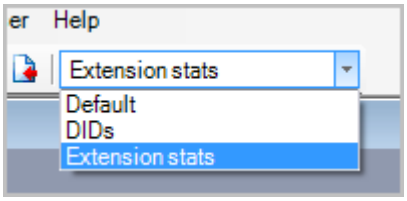


4) Using the Layout Name drop down list you can select the name of the screen layout you want to assign to the Agent Desktop users.
5) In the Assigned Users field you will see a list of all the Agent Desktop users configured within MyCalls. You can assign the currently selected layout to the users by clicking the box to the left of the user's name. This will then display a tick to show that the user is assigned the currently selected layout. You can remove the tick from a user to de-assign a screen layout from them.
6) Press 'OK' to save the assign layout selection to the Agent Desktop users.

Layout Pages

Pages are the main component of a screen layout. They enable you to display real time window information and arrange it in a way that best suits your organization.

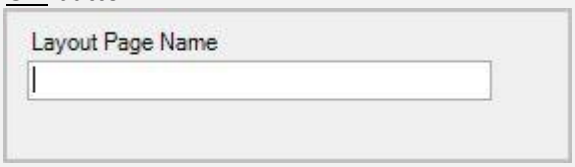
You can switch between saved pages of a layout by using the drop down list of pages within the main toolbar



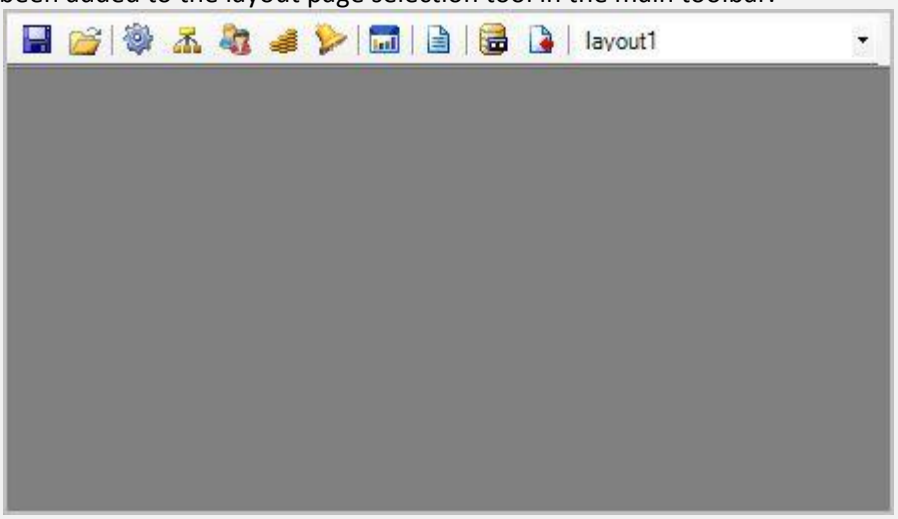
Creating New Pages

How To: Creating new Pages

1) From the layout menu select 'Pages' and click the 'New' option.
2) You will be prompted to provide a name for your new layout page. Enter a name and click the 'OK' button.



3) Your new page will now have been created and now be displayed on screen. The page will have been added to the layout page selection tool in the main toolbar.



4) You can now modify the page as per your requirements with real time window parameters

Deleting Pages

How To: Delete Pages

1) Select a layout page you want to delete using the layout page selection tool on the main toolbar.

2) From the layout menu select the Pages sub menu and then click 'Delete'
3) You will be asked to confirm the deletion of the currently selected page. Press 'Yes' to confirm the deletion or 'No' to cancel the process.
4) The page will now have been deleted and removed from the layout page selection tool on the main toolbar.

Save All Pages

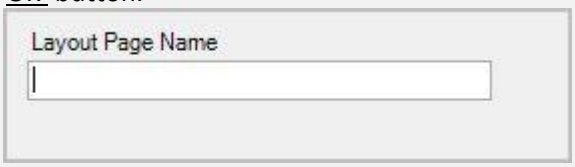
How To: Save all Pages

If you have been making a number of modifications to different pages in your layout you can save the work you have done across all pages by clicking the 'Save All' option in the Pages sub menu of the layout menu.

Copying Pages

How To: Copy pages

1) You may wish to create a page that is similar to an existing page you have available. To cut down the time it takes to setup a page layout you can use the Copy Page feature in the Pages sub menu of the layout menu.
2) You will be prompted to provide a name for your copied layout page. Enter a name and click the 'OK' button.



3) A copy of your existing page will now be displayed and available from the layout page selection tool. This new page should have the name you previously provided and you can alter existing settings to your requirements.

Reloading Pages

How To: Reload Pages

1) If you have made significant changes to a layouts page, but decide that you preferred the pages the way they were before, then you can revert them back to their previous state so long as you have not saved the changes in the meantime.
2) From the layout menu select the 'Pages' sub menu and then click on the 'Reload' option.
3) Your pages will now be restored to their previous saved state without any unsaved changes you have made since.

View Screen as Agent Desktop User

How To: View screen as an Agent Desktop User

1) You can view your screen as an Agent Desktop user would see it by choosing the 'View as Agent Desktop option' from the Pages sub menu of the Layout menu.
2) This will remove any real time window control boxes and lock the windows on the screen as they are positioned.
3) To come out of the Agent Desktop view in order to move and re-size real time windows you can select the 'Restore from Agent Desktop view' from the 'Pages' sub menu of the 'Layout' menu.

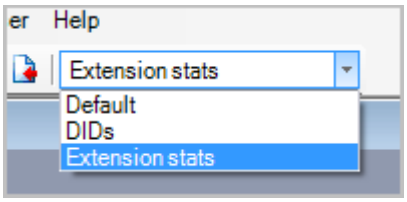
Resetting Installation Defaults

How To: Reset to installation defaults

1) If for whatever reason, you have got to the point where you wish you could start over again, you can.
2) From the Layout menu select the option 'Reset to Installation Default' and this will reset all your layouts and pages back to how they were when the application was first installed.

Automatic viewing of multiple pages

Having created a multiple page layout you can then view a single page using the drop down menu on the main toolbar.

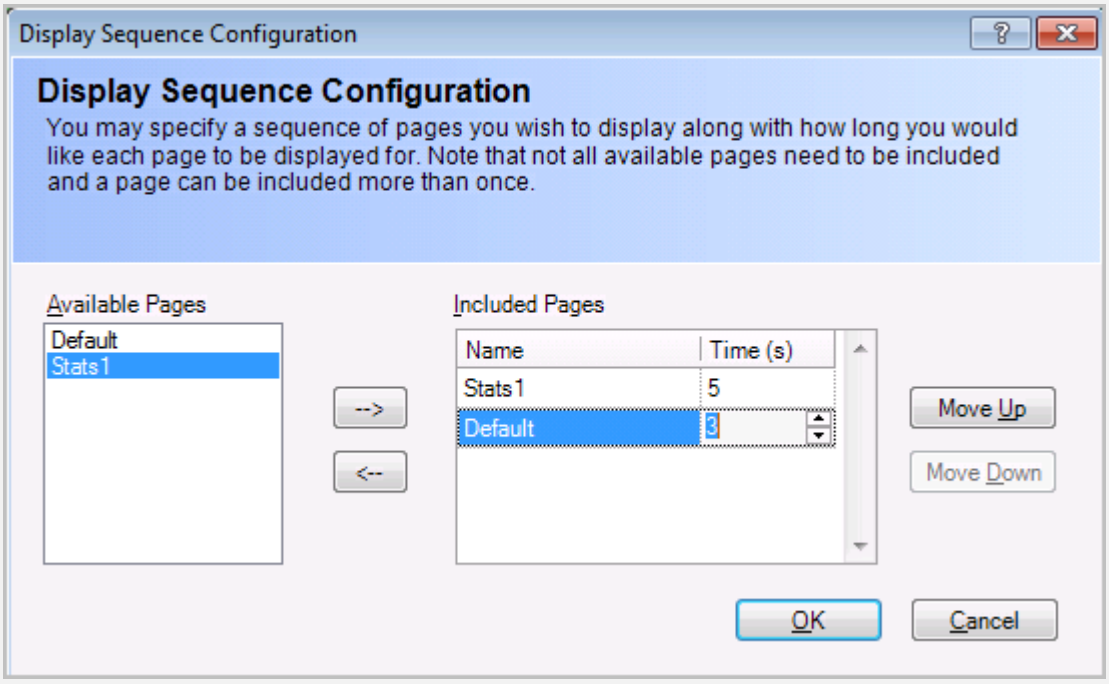


Alternatively by setting up a display sequence you can automatically display each page. The pages to be displayed are added into a display sequence. Your sequence can contain any or all of the pages you have created and they can be displayed in any order. There is also a timer for each page in the sequence so that you can vary the amount of time a particular page remains on screen.

Set up the sequence as follows

How To: Create a playback Sequence

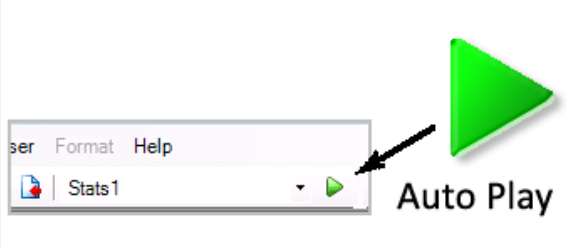
1) From the layout menu select 'Screen Layout Pages->Display Sequence



2) Using the displayed dialog select each page you wish to display from the available pages list. As you select each page click the select → button to add the page to the selected pages list.
3) For each page in the selected pages list you can change the number of seconds the page is to be displayed for. You can also alter the order in which the pages are to be displayed using the move up and move down buttons.
4) To remove a page from the list click the deselect ← button

5) When you have made your selections click OK

6) You can view the pages now by clicking the play icon from the main menu as shown below.



Tools to help you layout your pages

As seen in the previous chapter each page within a layout can be populated with various windows e.g. incoming calls, outgoing calls. These windows can contain statistical information, graphs, web content and other forms of data. To help us arrange this content on our pages MyCalls provides a set of alignment and sizing tools. Initially you will need to create the windows to be placed on the page. Once you have your windows on the page you can change their positions and sizes.

Manual alignment and sizing

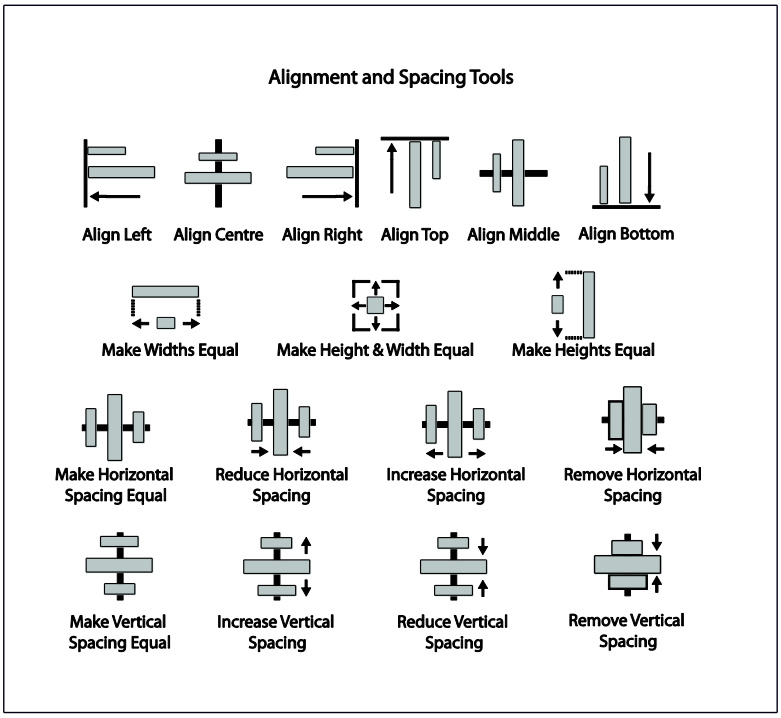
Any window placed on a page may be positioned by simply clicking and dragging the window to the new position. The windows can be resized by clicking on the frame of the window and dragging the window. Clicking on the side of a window will allow you to expand the window's width and clicking on the top or bottom of a window will allow you to expand the window's height. Clicking on a corner of a frame will allow the window to be expanded in both directions at once.

Selecting multiple windows

In order to align or resize multiple windows we must select the required windows on screen. To select multiple windows simply hold down the control (Ctrl) key on your keyboard and click on the windows you wish to include in the selection. Each window will be highlighted with a border. When multiple windows are selected the 'format menu' will be enabled. The automatic alignment and sizing tools operate on the first window selected, this means that if you were aligning two windows to the left, then both windows would align to the first selected window.

Automatic alignment and sizing

Several automatic alignment and sizing tools are available for you to use when designing your page layouts. These tools are located on the top toolbar or can be accessed via the 'format menu'.



The format menu and the alignment tools (shown above) are disabled unless multiple windows are selected. The options available are as follows.

Alignment:

Align Windows left: Align all selected windows to the left hand edge of the first selected window

Align Windows Right: Align all selected windows to the right hand edge of the first selected window

Align Windows Top: Align all selected windows to the top edge of the first selected window

Align Windows Bottom: Align all selected windows to the botttom edge of the first selected window

Align Centres Horizontally: Align selected windows along the horizontal axis

Align Centres Vertically: Align selected windows along the vertical axis

Sizing:

Make heights equal: Set all selected windows to the same height

Make widths equal: Set all selected windows to the same width

Make heights and widths equal: Set all selected windows to the same width and height

Distribution:

Make horizontal spacing equal : Space the selected windows equally across the width of the screen

Increase horizontal spacing: Increase the distance between selected windows across the screen

Decrease Horizontal spacing: Decrease the distance between selected windows across the screen

Remove horizontal spacing: Remove spacing between selected windows across the screen

Make vertical Spacing equal: Space the selected windows equally across the width of the screen

Increase vertical spacing: Increase the distance between the windows top to bottom

Decrease vertical spacing: Decrease the distance between the windows top to bottom

Remove vertical spacing: Remove the spacing between the windows top to bottom

Chapter 5

Real Time Status

What are Real Time Windows

A real time window is an on screen display of a value that is calculated there and then, from information collected from the PBX. These windows can be used to display information on the following single and group items.

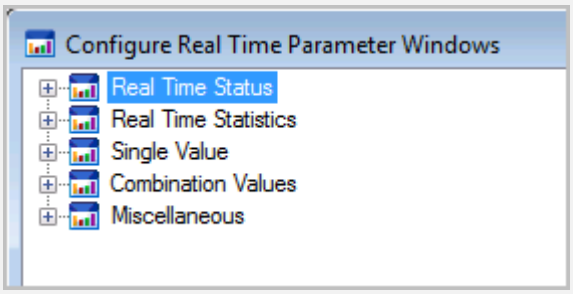
Single Items	Groups
DIDs	Trunk Groups
Extensions	DID Groups
Pilot Numbers	Extension Groups
Users	Pilot Number Groups
Trunks	Account Code Groups
	Organization Groups

There are four types of real time windows you can create to display call information; Real Time Status Windows, Real Time Statistics Windows, Single Value windows, and Combination Value Windows.

How To: Accessing Real Time windows

To access real time windows:

1) On the main MyCalls screen click View –> Real time information
2) This presents you with the following menu:



3) From this menu you can select the type of window you wish to view

Real Time Status Windows

A real time status window is one that displays a value that is derived from changes in state from the phone system. Configuring a Real Time Status window enables you to see immediate response to events which are occurring now, for example off hook, ringing and on hold conditions.

These windows can be configured to show information relating to Users, Extensions, DIDs, Pilot numbers, trunks and Trunk groups. Users, extensions and trunks can give us device status information i.e. what state are they in at this moment.

DIDs, Pilot Numbers and Trunk Groups represent queues of calls related to a particular DID, Pilot or Trunk group so the real time status associated with these items relates to the current number of calls waiting to be answered i.e. Calls in Queue (CIQ).

A DID queue relates to the calls currently waiting which dialled that DID number.

A Pilot queue relates to all calls which have been forwarded to a particular ACD queue (via a Pilot number).

A 'Trunk group' queue represents the number of calls waiting to be answered at this moment in time for the trunks in that group or all trunks, if selected.

Real Time Status Parameters

A Real time status parameter is a value that is displayed in real time as a result of an event occurring in the telephone system.

Real time status parameters can be displayed for the following types of devices and users:

- Users
- Extensions
- DID's
- Pilot Numbers
- Trunk Groups

User status gives a real time visual indication of the current state of the extension a user is logged on to. Extension status view is also available for specific extensions. You can view the following states:

- Idle/Available – The extension/user is available to receive calls
- Off Hook – Receiver is picked up
- Ringing – Incoming call is ringing the extension or user
- Incoming connected – Incoming call has been connected, call in progress
- Outgoing connected – outgoing call has been connected, call in progress
- Hold – The extension has been put on hold or an extension has put another on hold

- Internal – Internal (extension to extension) call is in progress
- DND (Do Not Disturb) – Extension is unavailable to receive calls
- Unavailable – ACD User is unavailable to the ACD queues
- Wrap UP – ACD User is wrapping up a call and is not currently available for a predefined time

Real time status parameters for queues e.g. DID, Pilot Numbers and Trunk Groups include:

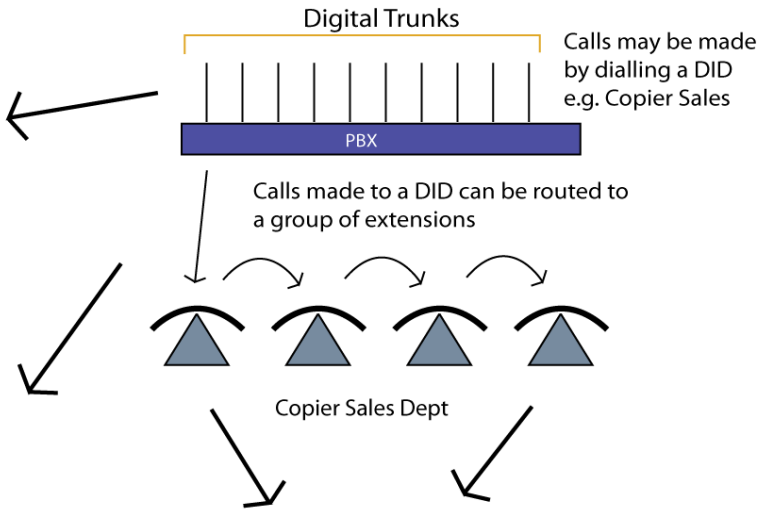
- Caller
- Trunk
- Usage (trunk Groups only)
- Calls In Queue
- Longest Wait Time

The following diagram shows how you might use real time status windows to look at calls being queued at different points in the telephone system.

Using Real Time Status screens to track call progress

Trunk status tracks trunk usage

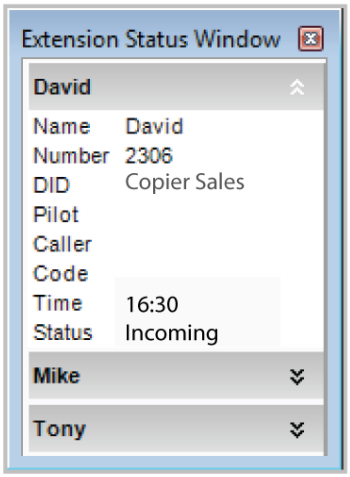
DID queue status tracks calls on a given DID number


Digital Trunks
Calls may be made by dialling a DID e.g. Copier Sales
PBX
Calls made to a DID can be routed to a group of extensions
Copier Sales Dept

CIQ = calls in queue

CIQ for trunks = number of trunks waiting to be answered

CIQ for DID = number of calls on the DID waiting to be answered



Extension status tracks device or user activity

Real Time Status tells us what is happening 'now' and changes as the call activity changes

Real Time Statistics tell us the total calls or average wait times spread over a defined period e.g. during the last hour or previous 24 hours

User/ Extension Status views

Detail, Summary and Overview views

Real Time Status windows offer three ways of viewing extension or user status; Detailed, Summary and Overview.

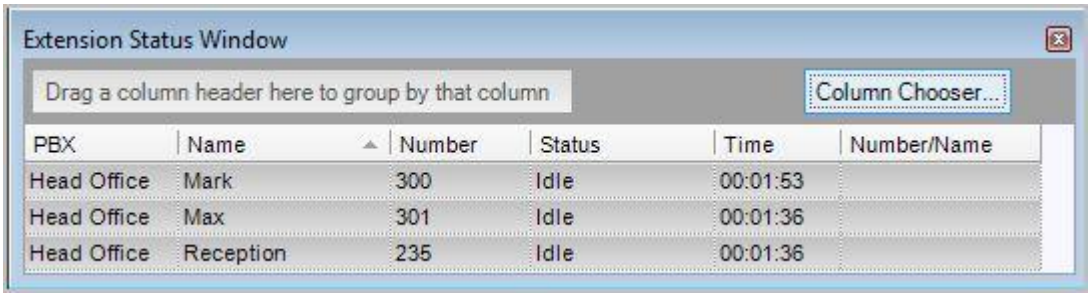
Detailed view

This view is designed for the use of people in a supervisory role who may want to see the state of each extension or user and the amount of time they have been in that state.

You can show combinations of states as each state is shown separately. The number of devices in any given state is shown e.g. Ringing (2) indicates 2 devices in the Ringing state. The devices or users in a given state are shown with the longest in that state at the top of the list.

Summary view

This view displays basic information relating to users or extensions. Only the currently active state is shown at any one time for each user or extension:

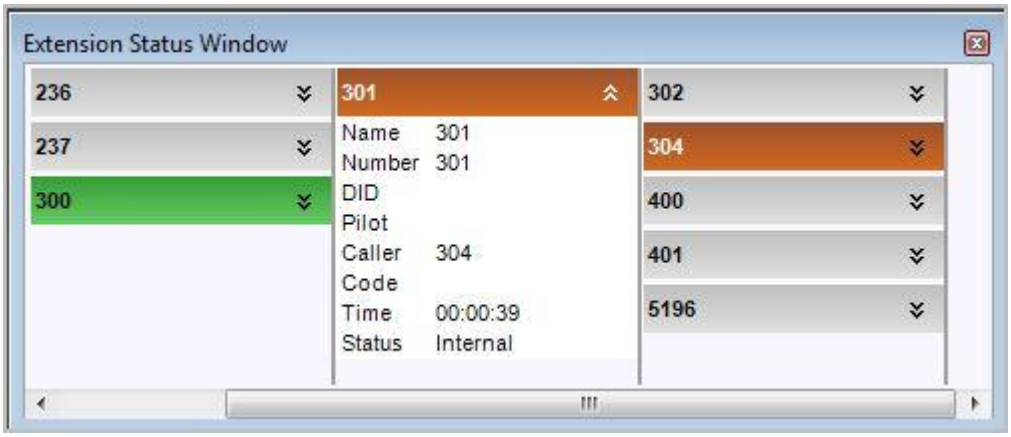


Several types of information can be displayed in this view:

- Group name
- User/extension name
- Extension number
- Current status
- Time in current state
- Calling/Called number

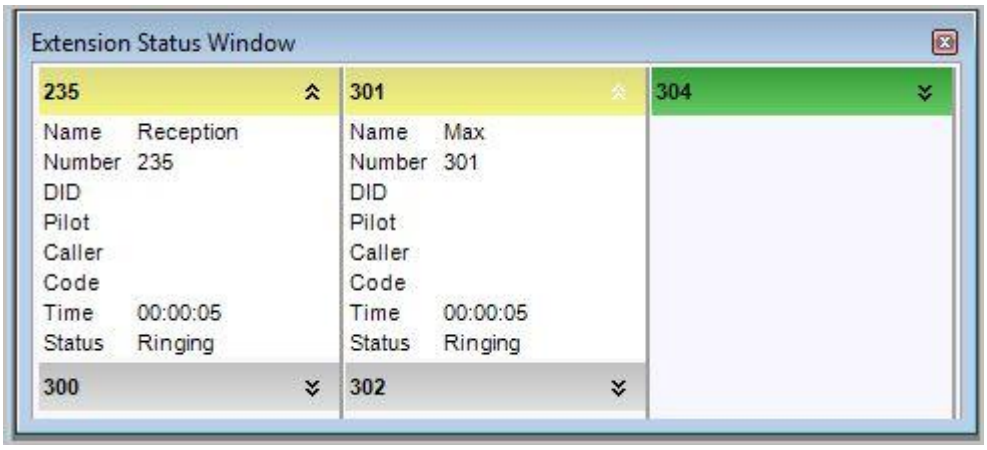
Overview view

This view is useful for showing the state of many extensions in one screen. This view displays the Extension name/number or user name and a visual indication of the current state for each user that is included in the view. The current state of the extension or user is indicated by a colour coded indicator bar.



The indicator bar can be extended to reveal additional information:

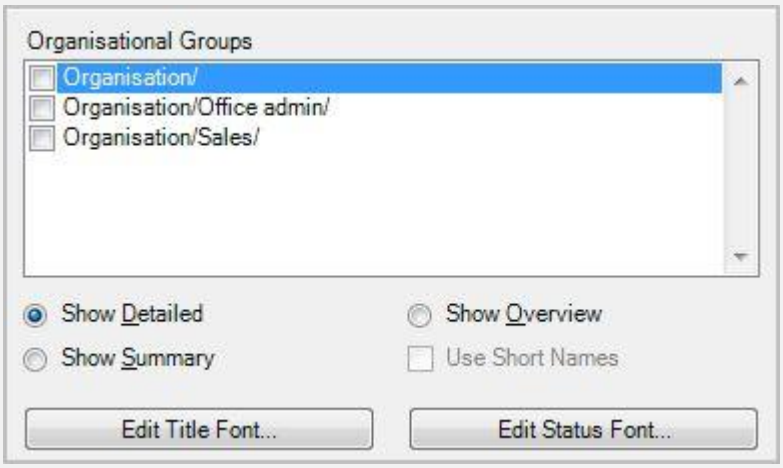
- Name of Extension or user
- Number – Number being called or calling in
- DID – DID that was called (Incoming calls only)
- Pilot number – Pilot number that the call was assigned to
- Caller – Calling in or being called
- Code – Unavailable code
- Time – Elapsed time in current state
- Current status – current state of extension or user



Creating User Status Views

How to: Creating a new User Status view

1) Click 'Real Time Status'
2) Select the output you wish to create a new user status for e.g. user
3) Click 'Create a new user status view'
4) A new dialogue window will appear



5) You can select one or more organization groups from the organizational group's selection box to include multiple group's user statistics in the window. Organisation groups are configured through the organization setup screen
6) Select the window type i.e. detailed, summary or overview described previously
7) With the detailed and summary variants of this window you can add additional column fields using the Column Chooser button. Removing a column is simple by holding the left mouse button on the column header and dragging the column out of the window then releasing the mouse button. The overview variant can have the Short Names option applied which will then display abbreviated name of the user (see user configuration)
8) You can change the style of the font for the detailed and summary windows separately using the Edit Summary Font and Edit Detailed Font screens
9) Click 'OK'

Queue status and Queue group status

When dealing with Users and Extensions we can only view their current status i.e. what is happening right now. When we are dealing with DIDs, Pilot numbers and Trunks however we want to see the amount of calls waiting to be answered.

When calls are waiting to be answered we refer to them as queued calls.

This can apply to the following situations:

- Where multiple lines are calling in on a single number (DID for example)
- Where multiple calls are incoming on multiple lines and waiting to be answered
- When calls are being queued within the PBX as part of an ACD system

Queue status windows can either give information for a specific queue e.g. 'All Trunks' or 'Sales DID' this is known as a queue status window. Alternatively you can view one or more groups of queues in a single window. This is known as a queue group status.

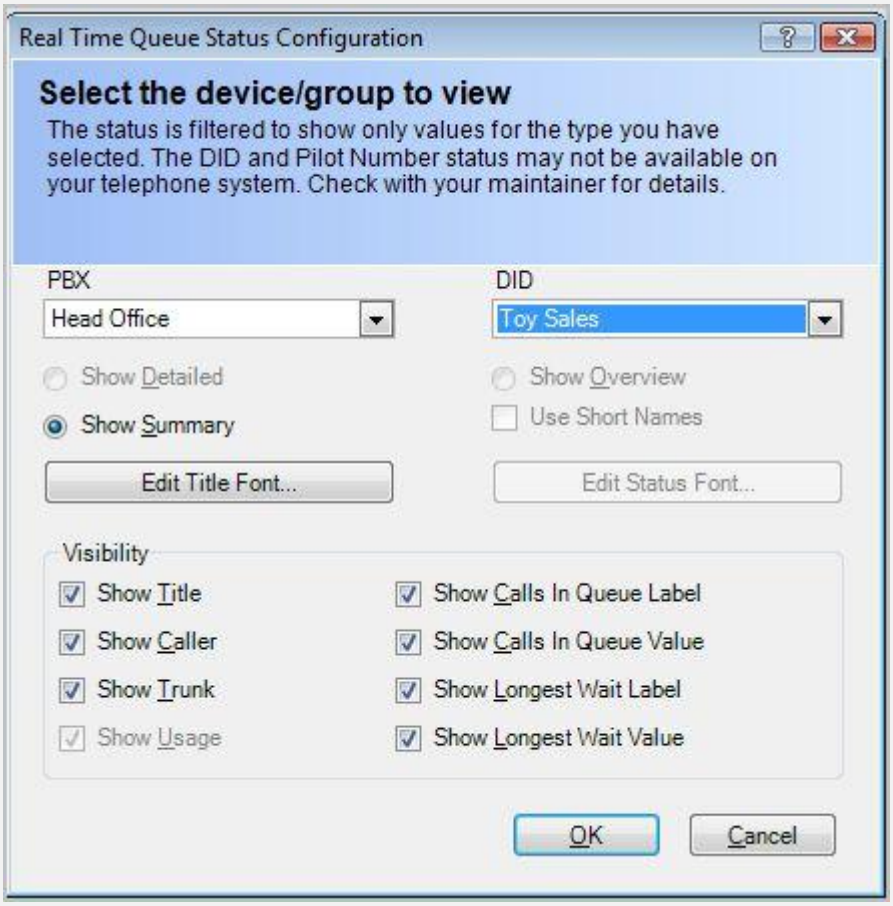
Queue status

A real time queue status window represents a statistic calculated in real time as each event is processed for a given device i.e. DID, Pilot number or Trunk. These windows are displayed as a current value such as the number of calls waiting to be answered at this moment in time.

The method for creating queue status windows is the same for DIDs, Pilot numbers and Trunks. The following is an example for the DID configuration.

How To: Configure a DID queue status window

1) From the 'View' menu select the option for 'Real Time Information' or select the icon from the main toolbar.
2) Expand the 'Real Time Status' section by clicking the + to the left of the text and then expand the DIDs section. Highlight the Queue Status option by clicking it and in the right side of the window
3) Click the task 'Create a New Queue Status View'
4) The 'Real time queue status' configuration screen will be displayed



5) If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list
6) Select a DID available from the DID drop down list
7) You can change the style of the title font for the window by pressing the Edit Title Font button

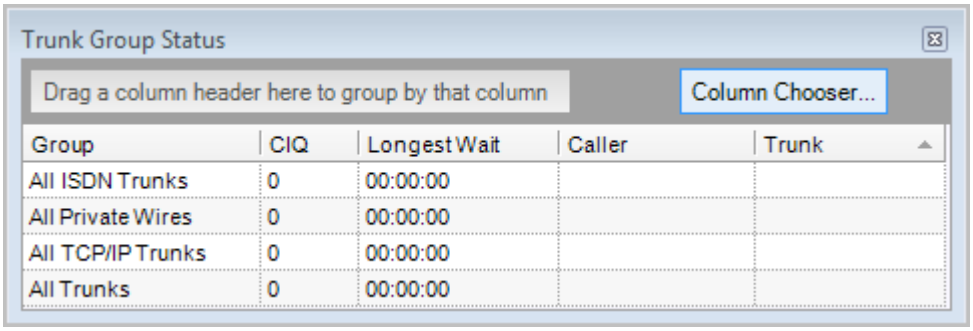
and configuring the various style options

8) In the visibility area of the configuration screen there are a number of options that can change the view of your queue status window.
9) To enable any of them just click the box to the left of the option and ensure there is a tick in the box.
10) To disable an option just remove the tick.
11) **Show Title:** If enabled this will display in the window the device type and the device name.
12) **Show Caller:** If enabled this option will display in the window the CLI of the next caller in the queue.
13) **Show Trunk:** If enabled this will display in the window the trunk or line the next incoming queued call is being received from.
14) **Show Calls in Queue Label**: If enabled this will display in the window the CIQ: label for the number of calls in queue value.
15) **Show Calls in Queue Value**: If enabled this will display in the window the number of calls in queue value.
16) **Show Longest Wait Label**: If enabled this will display in the window the Longest Call Waiting label for the longest call waiting value.
17) **Show Longest Wait Value**: If enabled this will display in the window the longest call waiting value.

18) When you have completed the configuration of your windows settings then press the 'OK' button and your window will be placed on the currently selected layouts page.
19) Press 'Cancel' at any time to abort the setup.

Queue-Group status

If you want to display the number of calls that have not been answered and are currently waiting in queue for one or more groups, along with other head of queue information then a queue group status is required

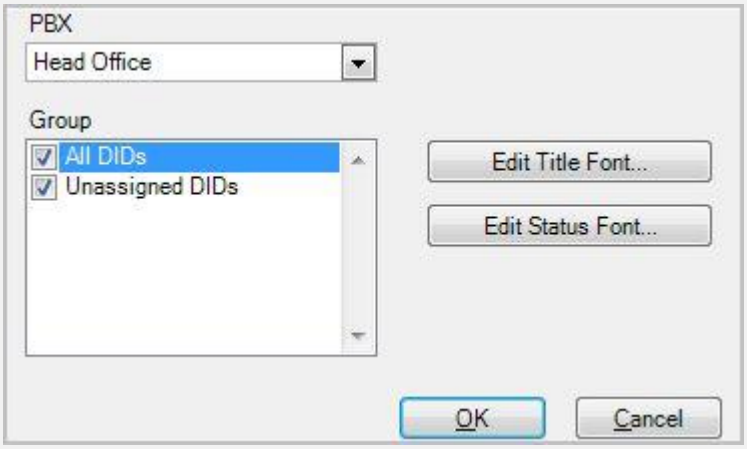


Devices which support queuing should be grouped so that useful information can be obtained from them. Trunks could be grouped according to function e.g. Analogue trunks, GSM gateway trunks, BRI ISDN trunks.

The following method shows how to configure a DID queue group status; however the method is the same for DIDs, Pilot numbers and Trunks.

How to: Create queue group status for DID groups

1) Click 'Real Time Status'
2) Select the output you wish to create a queue group status for e.g. DIDs
3) Click 'Create a New Queue Group Status View', the following dialog will appear



4) In the new dialogue window that appears, select the group or groups to include in the resulting window
5) Click 'OK'

Viewing Trunk Status

It can be very useful to know what our trunk usage is at any point in time. Using a trunk status window we can monitor usage for individual trunks and we can also display trunks in specific states such as busy, idle or ringing etc. Detailed, summary or overview views are available as with other real time status windows.

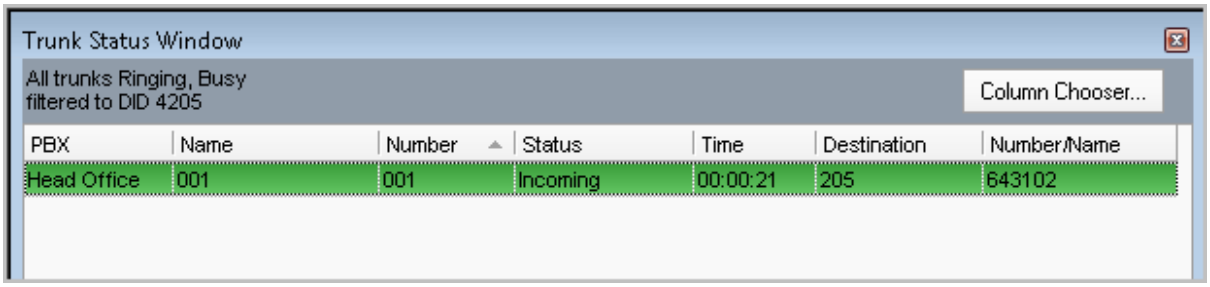
Using Trunk Status

The ability to view real time status gives you several ways of viewing the call activity within the organisation. Typical questions which can be answered include:

How many calls are in a particular state right now e.g. on-hold, ringing, being answered, making an outbound call?

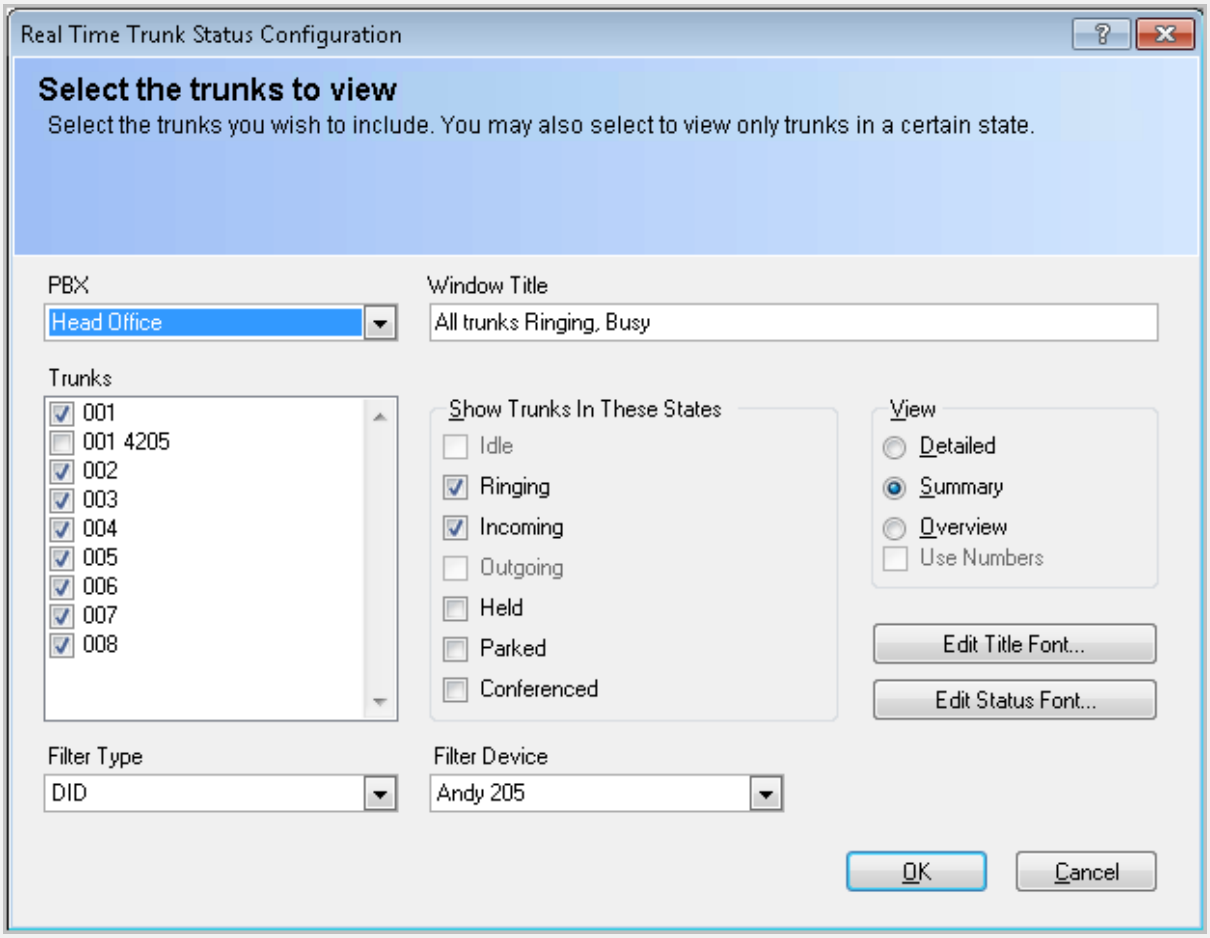
Which trunks have been busy the longest?

How many calls are ringing a specific DDI or put another way how many sales enquiries are waiting to be answered right now?



How To: Create a trunk status view

1) Select View->Real Time Information->Real time status->Trunk Status
2) Click 'Create a trunks status view'



3) Select the trunks to monitor from the 'Trunks List'

4) Select the states to monitor by checking the appropriate boxes in the ‘Show trunks in these states’ list.
5) Select the View style e.g. detailed, summary or overview.
6) If required select a DID as a filter type and select the DID to filter results for in the filter device. This will ensure only calls for the specified DID will be displayed.

Chapter 6

Real Time Statistics

Real Time Statistics Windows

Real time statistics allow you to calculate a wide range of statistical values for all the devices, users and groups. The groups can either be predefined system groups or user defined. The system groups are automatically created and devices are assigned to these system groups according to the device type e.g. Digital Desk Phones. User defined groups are created by the application users according to how the devices and users are used in the organisation e.g. Sales, Accounts.

Statistical periods and calculations

Statistics can be calculated in various ways depending on how you want to view your data. Each of the statistics windows allow you to select the period over which the statistics are calculated.

Historical statistics

These statistics are calculated differently depending on how you select the period.

Daily: calculates a daily accumulated value or average which is reset each day at midnight

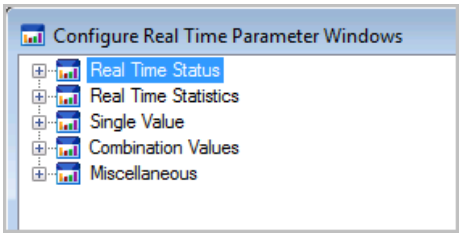
Hourly: Calculates accumulated or averaged statistics for each hour of the day. All values are reset at midnight.

Current statistics

Last Hour: These values are calculated as a rolling statistic over the previous 1 hour period, for example if the time is currently 14:30 then the current value calculated will be that value between 13:30 and 14:30

Types of Real Time Statistics window

There are four types of real time statistics accessible via the real time information menu; Real Time Statistics (Grid View) windows, Single Value windows, Combination value and Miscellaneous windows.



Real time statistics (Grid View) windows display a user defined selection of statistics for one or more devices or groups.

Single value windows show an individual statistic in either a Numerical or Graphical format.

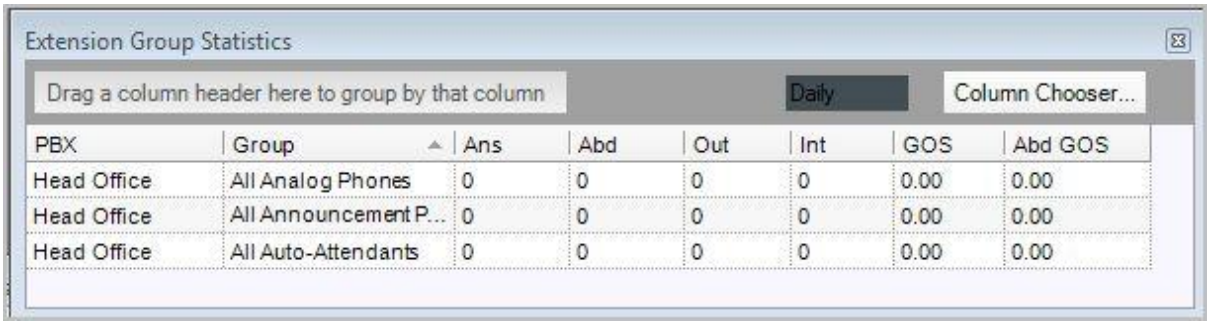
Combination value windows show comparative statistics of different statistics on the same graph.

Miscellaneous windows can display external data from XML, Database and other data sources and live web pages.

Grid View Statistics windows:

Select View -> Real Time Information -> Real Time Statistics from the MyCalls menu.

This type of window allows you to view many statistics in the minimum screen area. You can configure group or individual statistics grid views.

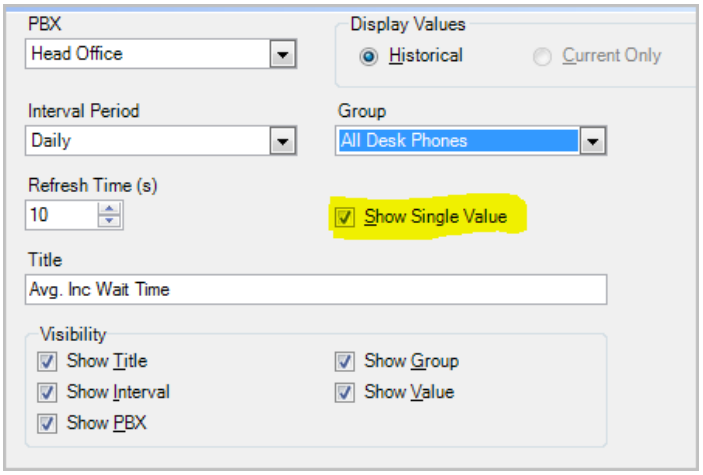


PBX	Group	Ans	Abd	Out	Int	GOS	Abd GOS
Head Office	All Analog Phones	0	0	0	0	0.00	0.00
Head Office	All Announcement P...	0	0	0	0	0.00	0.00
Head Office	All Auto-Attendants	0	0	0	0	0.00	0.00

Real time statistics displayed in the grid view allows you to display cumulative call statistics on users, DIDs, extensions, pilot numbers, DID groups, extension groups, pilot number groups and trunk groups. Statistics included by default include answered calls, abandoned calls, grade of service and abandoned grade of service although more fields are available to be added to the view if required.

Daily/ Hourly Single Value windows:

Single value windows provide numeric or graphical windows showing single value statistics based around Call Rate and Performance. Call Rate windows display numerical values only whereas performance statistics can display results as numerical values or graphical values. To show these parameters as a numerical value select the 'Show Single Value' in the configuration window.



Numerical values appear as a single coloured window showing the parameter value and other associated information such as Title, Group, and the Interval over which the statistic is calculated e.g. daily, hourly.

Call Rate statistics show the cumulative counts for the various call types and you can elect to display these values over both historical (daily, hourly) periods and current (last hour) periods.

Call Performance statistics are either cumulative totals e.g. number of long calls, or average values e.g. average wait time.

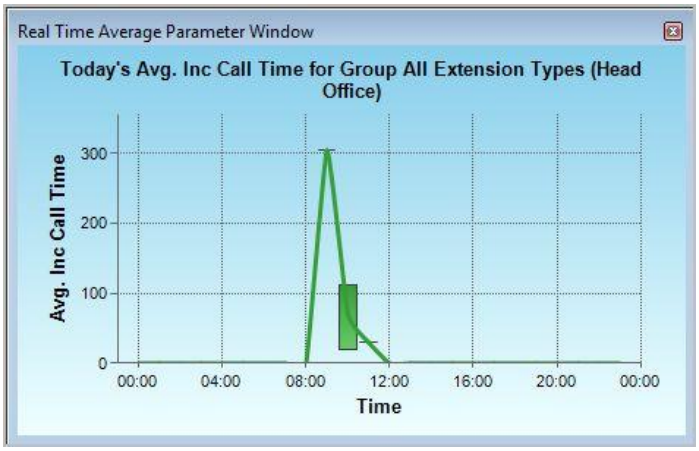
The cumulative total statistics can only display values numerically and you can select both historical and current calculation periods.

The Average value statistics can be displayed in both numeric and graphical format and the statistical period is limited to either 'Daily' or '24 Hour' options. If you elect to display the values in numerical format you will need to select the 'Show Single Value' Checkbox in the configuration screen* and this option is only be available for the daily period.

*See detailed configuration later in this section.

Numerical View of average wait time statistic

The graphical output displays the Min/Max values for the parameter as a bar and the average value is shown as a line graph over the 24 hour period.



Graphical view of Average Wait Time 24 hour

Unreturned calls real time windows

The unreturned calls operate differently to other real time statistics windows in that they can be displayed as a list format showing all unreturned calls currently active or they can be displayed as a single value window showing a total number of currently unreturned calls.

You can create an unreturned calls window for each device type allowing you to show the unreturned calls for a specific group of devices such as extensions, DIDs etc.

How To: Create an unreturned calls real time window

Select View->Real Time Information->Single Value

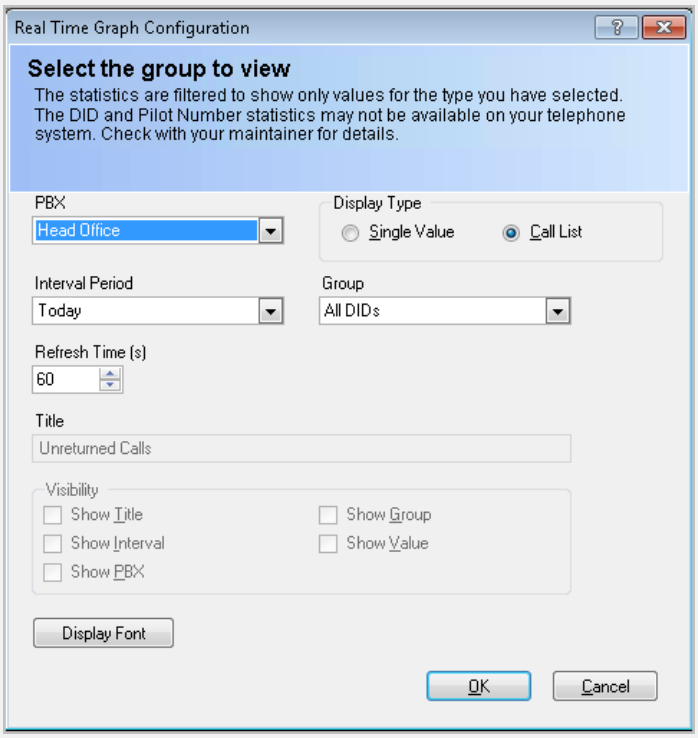
Select the type of device group you wish to filter the unreturned calls on so if you want to see all the unreturned calls coming into a group of DIDs then select DID groups -> call rate-> unreturned calls.

Select Single Value or Call List depending on the display type you require

Set the Interval period either to Last 24 hours or today which shows calls from midnight previous.

Select the device group either system or user created group

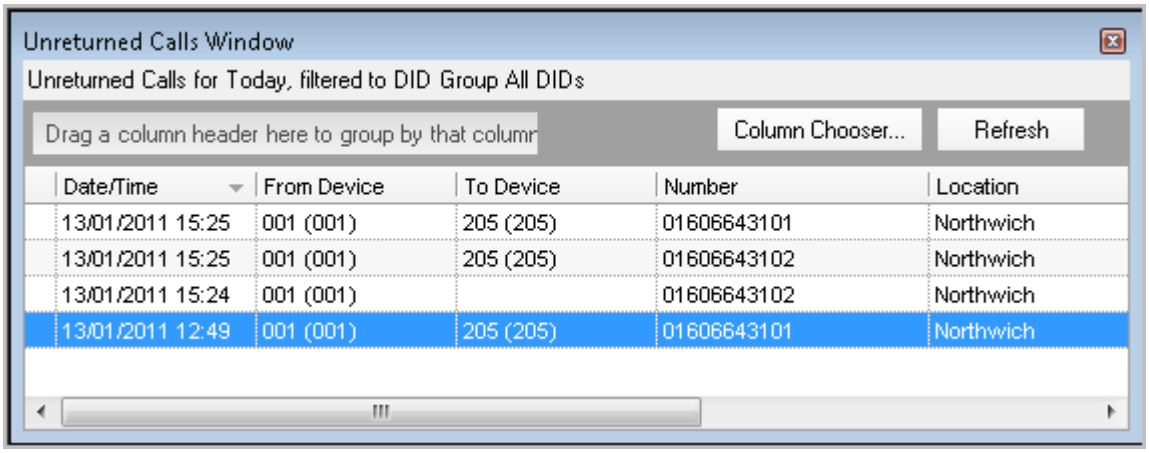
Click OK



Real time calls window configuration dialog

The resulting windows look as follows:

Unreturned calls single value window

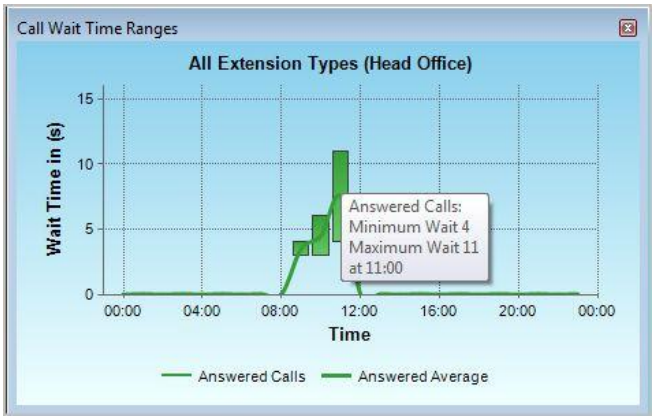


Unreturned calls list window

Combination Value windows:

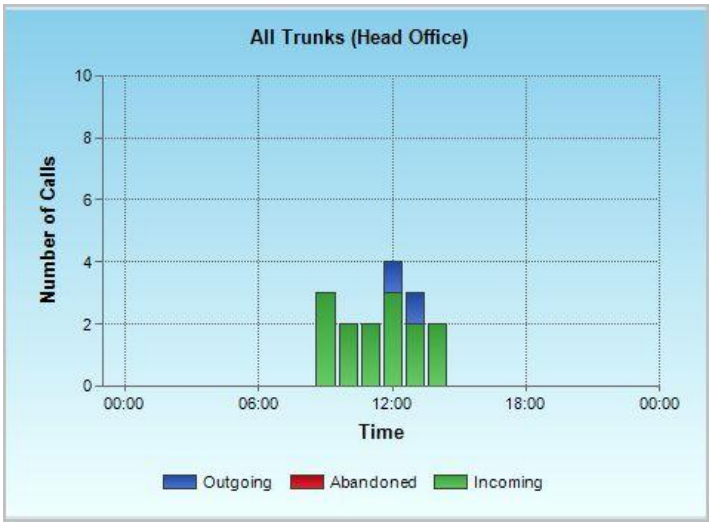
Combination value windows provide graphical representation showing call volume histograms and the maximum and minimum number of calls mapped against average values.

Combination values can only be displayed for historical statistics i.e. daily and 24hour and can display min/max bar charts for each hour and a line graph overlay showing the average values over time.



Moving the mouse over the graph will show the Average and Min/Max values in a context window.

The Combination values work best when looking at and comparing different call types such as Outgoing and Incoming calls.

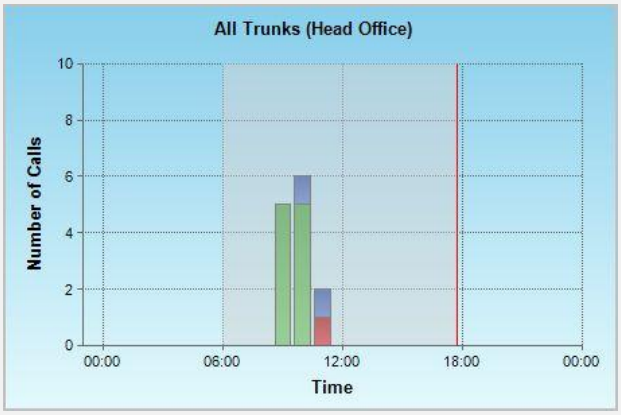


Manipulating the Graphical displays

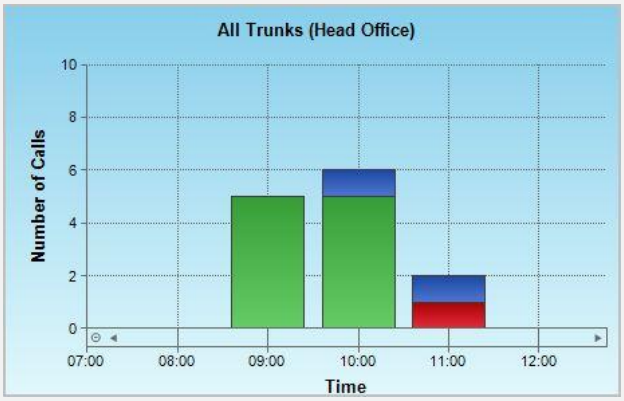
Single value and Combination value windows can display results in graphical format. These graphs are easily manipulated to allow you to zoom into the area of interest as follows.

How To: Manipulate the graph

1) The original graph as seen above shows the activity over a 24 hour period, from midnight to midnight. Generally the data you will be most interested in is during your working hours, for example from 9 till 6. MyCalls allows you to zoom in on these areas so that you don't get a lot of space where there's no activity.
2) To zoom in on a selected area click the mouse and drag across. For example, click the mouse at 6am and drag to 6pm.
3) A shaded area will appear over the selected area.



4) Click to release, and a larger, zoomed in version will appear.



5) Repeat this until you have the desired selected area.
6) To return to the original graph click the minus icon on the bottom left side of the graph. Click this several times.

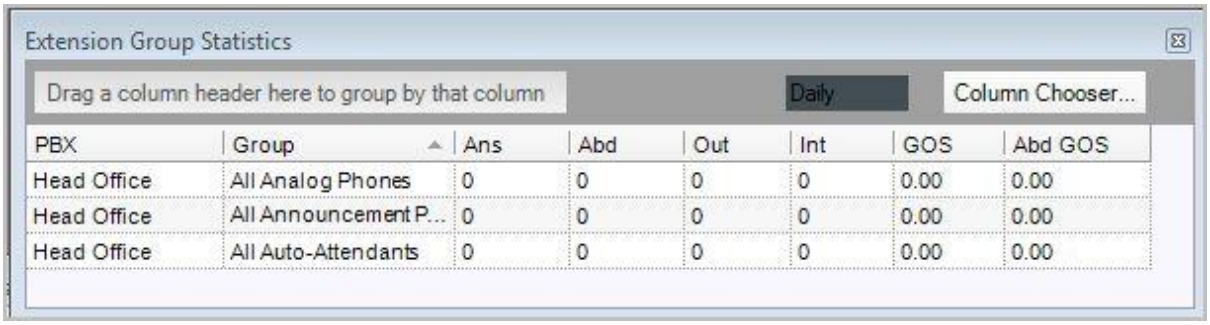
Configuring Real Time Statistics windows

Group statistics windows

You can view a wide variety of statistics for groups by configuring group statistics windows. You will need to create a separate window for each type of group from DID, Pilot, Trunk and Extension groups depending on what you want to view. Configuring the Group statistics window is the same in each case.

The device groups are arranged under the menu options:

- DID Groups
- Pilot number groups
- Trunk groups
- Extension groups

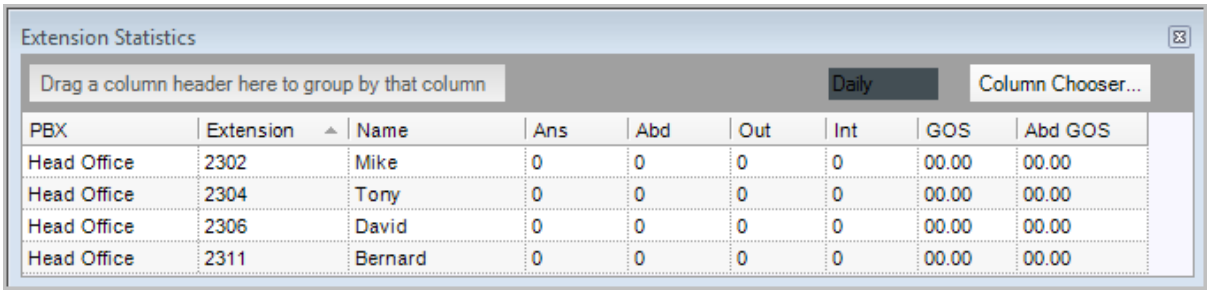


Individual statistics windows

If you want to see statistics for individual devices or users these can also be configured. You can view individual statistics for Extensions, Users, DIDs and Pilot numbers. You will need to configure a different window for each category and the method of configuration is the same in each case.

Individual statistics are arranged under the menu options

- Extensions
- Users
- DIDs
- Pilot numbers



Available statistics

Once you have created your statistics window you can view a wide range of values by selecting the value from the column chooser. This gives a list of columns which can be dragged across to the statistics window. The available statistics are as follows:

Average incoming duration

Average duration for incoming connected calls

Average outgoing duration

Average duration for outgoing connected calls

Average total duration

Average duration of all calls

Average overflow duration

Average duration for overflow calls. Overflow calls are waiting calls which have been moved from one ACD queue to another.

Average overflow wait time

Average wait time for overflowed calls

Average abandoned call wait

Average time which incoming abandoned calls were prepared to wait

Average incoming call wait

Average time which incoming connected calls were prepared to wait

Average ring no answer (RNA) call wait time

Average time which incoming calls had to wait before being answered when the intended extension did not answer in time and the call had to be forwarded to an alternative extension.

Long Abandoned wait

Number of abandoned calls where the ring time exceeded the 'ABD Ring' (abandoned ring time) defined in the Grade of Service for that specific device or group. The ABD Ring setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

Long incoming calls

Number of connected incoming calls where the duration exceeded the 'Inc/Overflow Call' (maximum call duration) defined in the Grade of Service for that specific device or group. The Inc/Overflow setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups. This statistic will include overflowed calls.

Long incoming wait

Number of connected incoming calls where the ring time exceeded the 'Inc/Overflow Ring' (maximum ring time) defined in the Grade of Service for that specific device or group. The 'Inc/Overflow Ring' setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

Long overflow calls

Number of connected overflow calls where the duration exceeded the 'Inc/Overflow Call' (maximum call duration) defined in the Grade of Service for that specific device or group. The Inc/Overflow setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

Long overflow waits

Number of connected overflowed calls where the ring time exceeded the 'Inc/Overflow Ring' (maximum ring time) defined in the Grade of Service for that specific device or group. The 'Inc/Overflow Ring' setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

Overflow

Number of connected overflowed calls.

Ring no answer

Number of ring no answered calls

Total calls

Total number of incoming and outgoing calls relevant to the specific group or device

Total duration

Total duration of connected incoming and outgoing calls calculated for a specific group or device

Total abandoned calls

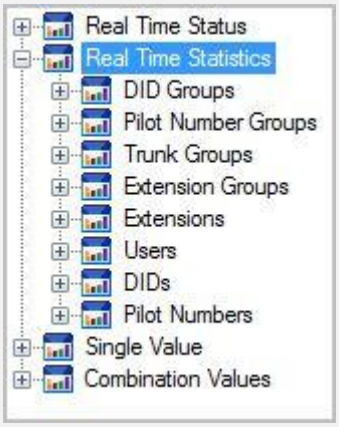
The number of calls where the caller terminated the call before being answered by a group for a defined period

Creating Grid View real time statistics windows

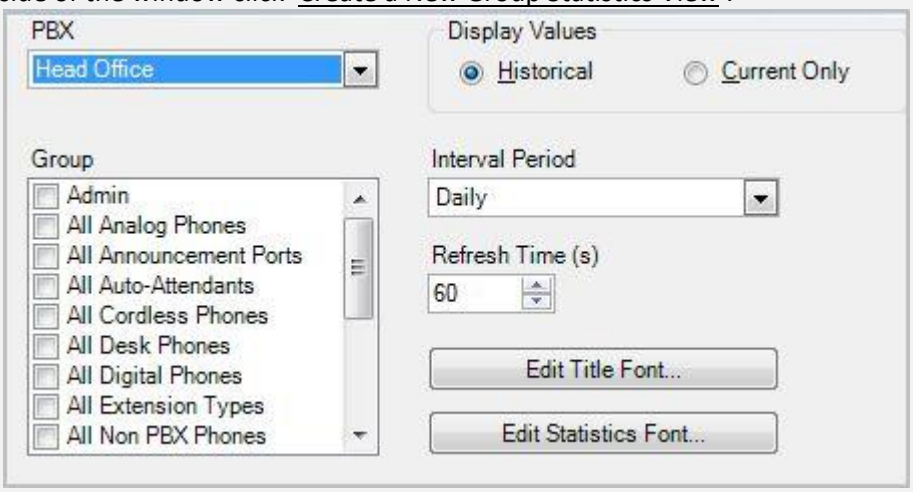
Real time statistics windows can be configured to show groups of devices or individual devices. In operation grouped devices are very useful as they show an overall set of values across several devices or users.

How To: Creating a group statistics window for Extensions Groups

1) From the 'View' menu select the option 'Real Time Information' or select the icon from the main toolbar.



2) Expand the Real Time Statistics section by clicking the '+' to the left of the text and then expand the 'Extension Groups' section. Highlight the Group Statistics option by clicking it and in the right side of the window click 'Create a New Group Statistics View'.



3) If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list.

4) **Group:** Select an Extension Group or multiple groups from the list of available groups in the group list window. By default selections for All Desk Phones, All Digital Phones, All Extension Types, All Non PBX Phones, All System Phones, All User PBX Phones, All User Phones, All Voice Mail Ports and Unassigned Extensions will be available. Additional entries are configured through telephone configuration.

5) **Display Values:** You can select to display either historic of current values. If you choose historical then the intervals available will be either Daily or Hourly. Daily will display statistics for the current day whilst hourly will display the statistics for the current hour of the day. If current

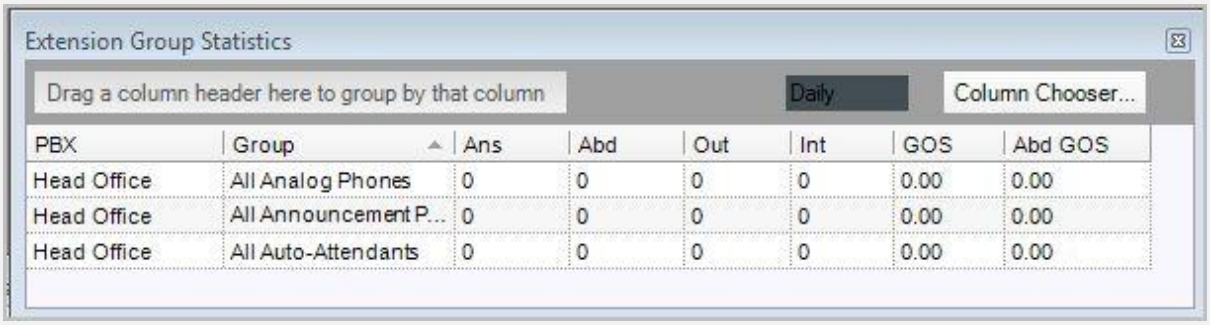
only is selected then the intervals available are Last hour and this is rolling time period for the previous 60 minutes from the current time.

6) **Interval Period:** After selecting the display values in instruction 6 choose the interval period from the interval period drop down list.

7) **Refresh Time:** You can set the refresh time for when you want the statistics in the window to refresh. By default this is set to 60 seconds.

8) You can change the style of the title and statistics fonts for the window by using either the Edit Title Font button or Edit Status Font button and configuring the various style options.

9) When you have completed the configuration of your windows settings then press the OK button and your window will be placed on the currently selected layouts page. Press cancel at any time to abort the setup.



10) Once the window is created you can add additional columns to what is setup using the Column Chooser. If you want to remove any columns from the window then hold down the left mouse button on the column header you want to remove and drag the column out of the window area.

Creation of individual device statistics window is a similar process to configuring a group window but

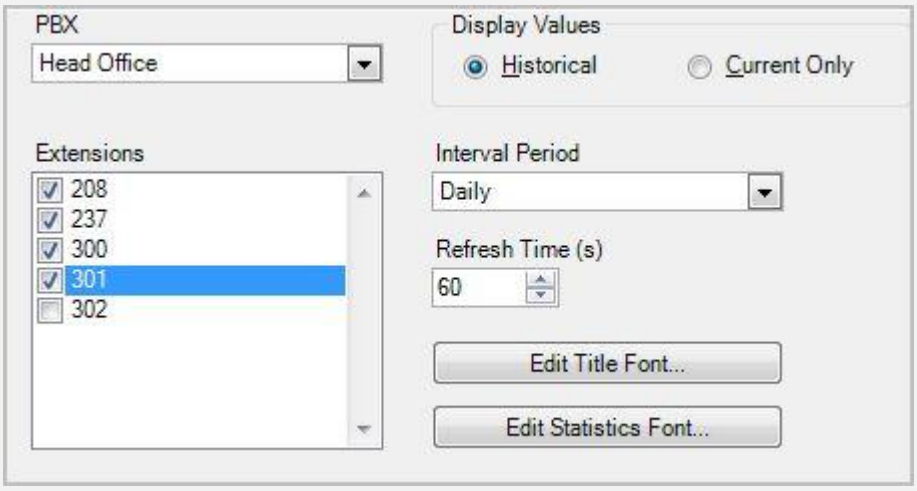
How To: Creating an Extension statistics window

1) From the toolbar click 'View'

2) Select the option for Real Time Information or select the icon from the main toolbar.

3) Expand the Real Time Statistics section and then expand the Extensions section. Highlight the Extension Statistics option by clicking it and in the right side of the window click the task 'Create a New Statistics View.'

4) The real time extension statistics configuration screen will be displayed. (Note: in order for extensions to show up you need to enable real time statistics)



5) **PBX:** If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list.

6) **Extensions:** Select Extensions from the list of available devices in the Extensions list window. If your extension does not appear here then it may need to be configured through telephone configuration.

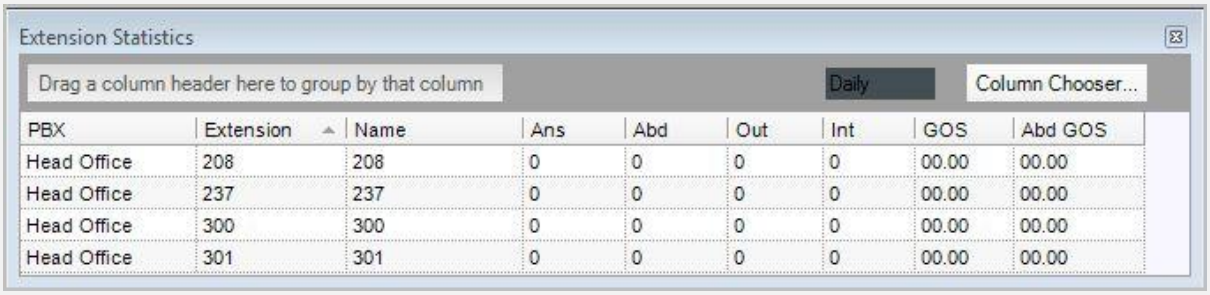
7) **Display Values:** You can select to display either historic of current values. If you choose historical then the intervals available will be either Daily or Hourly. Daily will display statistics for the current day whilst hourly will display the statistics for the current hour of the day. If current only is selected then the intervals available are Last hour and this is rolling time period for the previous 60 minutes from the current time.

8) **Interval Period:** After selecting the display values in instruction 6 choose the interval period from the interval period drop down list.

9) **Refresh Time:** You can set the refresh time for when you want the statistics in the window to refresh. By default this is set to 60 seconds.

10) You can change the style of the title and statistics fonts for the window by using either the Edit Title Font button or Edit Status Font button and configuring the various style options.

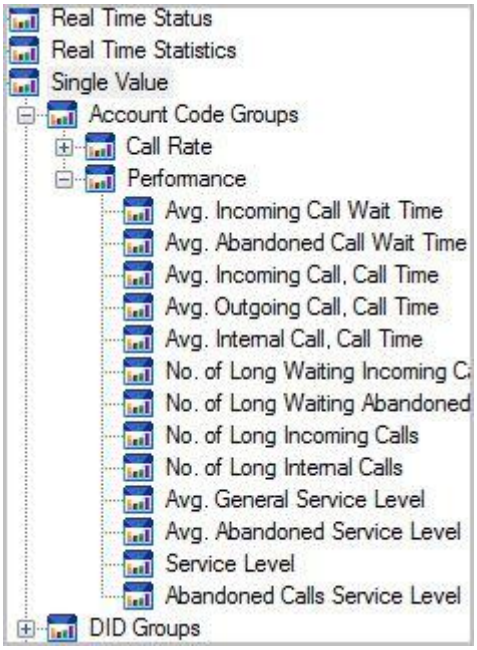
11) When you have completed the configuration of your windows settings then press the OK button and your window will be placed on the currently selected layouts page. Press cancel at any time to abort the setup.



12) Once the window is created you can add additional columns to what is setup using the Column Chooser. If you want to remove any columns from the window then hold down the left mouse button on the column header you want to remove and drag the column out of the window area.

Single Value Windows

Single Value windows are designed to display a statistic that is calculated in real time as each call is processed. These values can either be displayed as a current value or as a range of values over a defined time period or interval, such as number of calls answered in each hour. Single value windows can only display information relating to a whole group of devices or users including account code groups, DDI groups, extension groups, organization groups, pilot number groups and trunk groups.



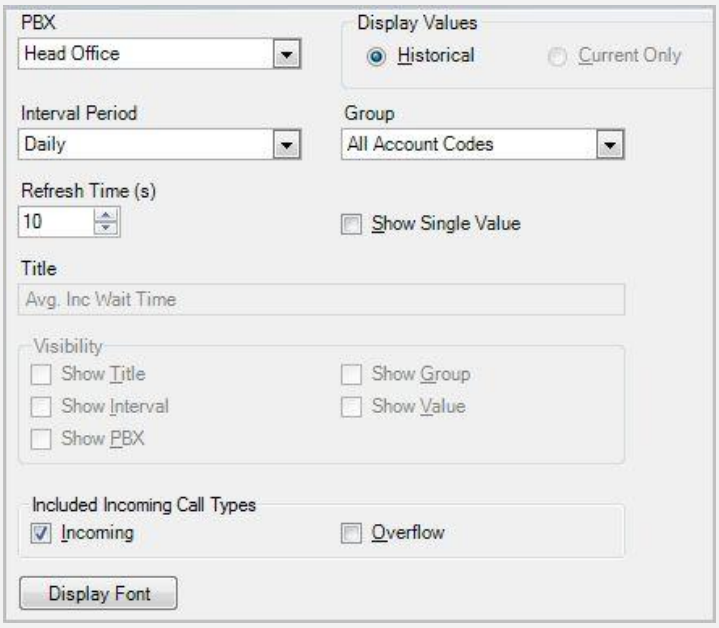
Single Value windows – quick reference table

	Account Code Groups	DID Groups	Extension Groups	Organisation Groups	Pilot Number Groups	Trunk Groups
Call Rate						
Incoming Calls	•	•	•	•	•	•
Overflow Calls	•	•	•	•	•	•
Outgoing Calls	•		•	•		•
Internal Calls	•		•	•		
Abandoned Calls	•	•	•	•	•	•
Performance						
Avg. Incoming Call Wait Time	•	•	•	•	•	•
Avg. Incoming Call, Call Time	•	•	•	•	•	•
Avg. Overflow Call, Wait Time	•	•	•	•	•	•
Avg. Overflow Call, Call Time	•	•	•	•	•	•
Avg. Outgoing Call, Call Time	•		•	•		•

	Account Code Groups	DID Groups	Extension Groups	Organisation Groups	Pilot Number Groups	Trunk Groups
Avg. Internal Call, Call Time	•		•	•		
Avg. Abandoned Call, Wait Time	•	•	•	•	•	•
Avg. General Service Level	•	•	•	•	•	•
Avg. Abandoned Service Level	•	•	•	•	•	•
No. Of Long Waiting Incoming Calls	•	•	•	•	•	•
No. Long Waiting Overflowed Calls	•	•	•	•	•	•
No. Of Long Incoming Calls	•	•	•	•	•	•
No. Of Long Overflowed Calls	•	•	•	•	•	•
No. Of Long Outgoing Calls	•		•	•		•
No. Of Long Internal Calls	•		•	•		
No. Of Long Waiting Abandoned Calls	•	•	•	•	•	•
Service Level	•	•	•	•	•	•
Abandoned Service Level	•	•	•	•	•	•

How To: Creating a single value window

1) Select the group you wish to show statistics for from the single value window list
2) Select 'Call Rate' or 'Performance'
3) Select the statistic that you wish to view from the list
4) Click 'Create a New Real Time Parameter Window'
5) In the dialog window that appears, you can alter the interval period, choose a group, alter the time and tick if you want to show a single value.

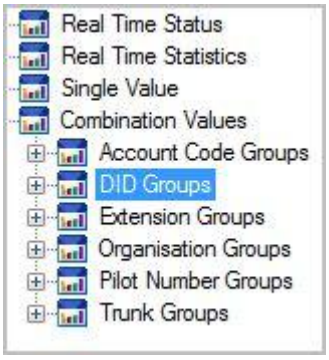


6) The window will appear on the screen

7) Click 'OK'

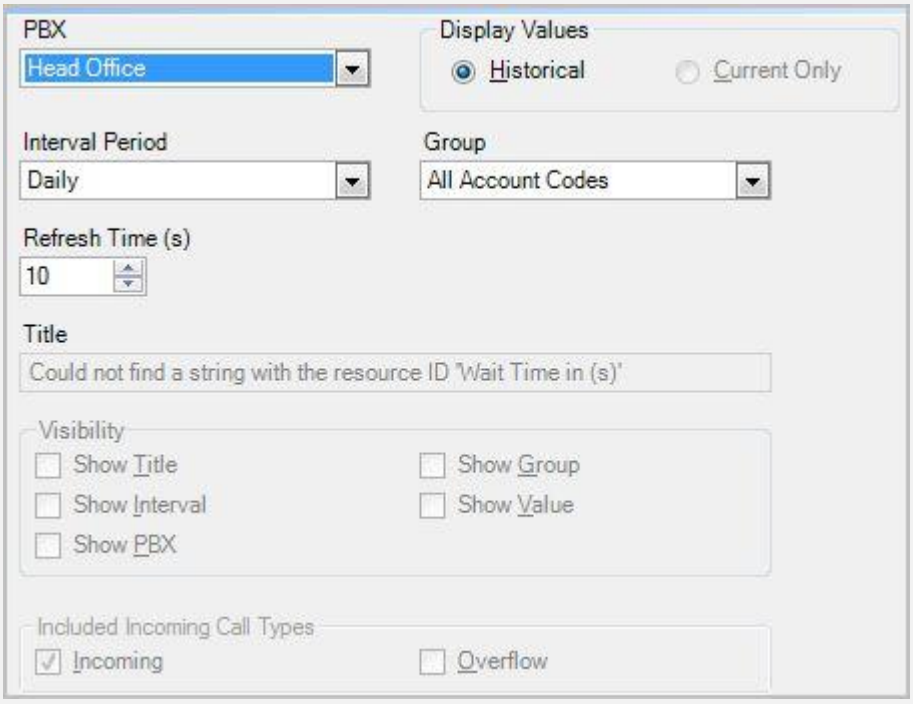
Combination Value Windows

A combination window displays several statistics at the same time. These can be used to see how one value affects another, like a difference in call volume might result in customers receiving longer waiting times. In this example more people are needed to answer calls to keep the wait time the same.



How To: Creating Combination Value Real Time Parameter windows

1) Click to expand 'Combination'
2) Select the group you wish to expand e.g. DIDs
3) You are now presented with two options: clicking 'call rate' or 'performance'
4) If you click call rate you will be presented with a call volume chart
5) If you click performance, you will be presented with a chart of call wait time ranges.
6) On both occasions the following window will appear:



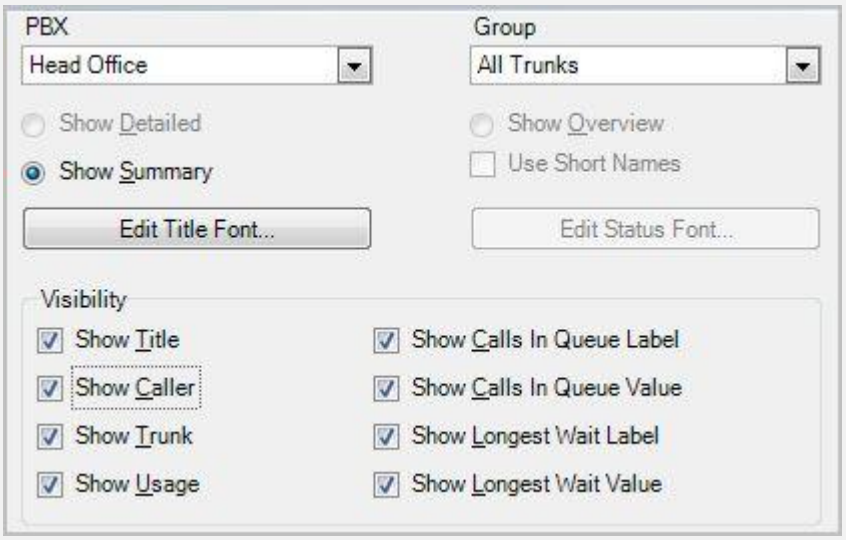
7) You can alter the interval period, the group and the refresh time.
8) Click 'OK'

Removing a Real Time window

To remove a real time window from your layout page, Press the in the top right of the window and it will be deleted.

How To: Configuring an existing Real Time window

1) To change the configuration settings of a real time window, right click over the selected window with your mouse and select the 'Configure' option from the menu that appears near your cursor.
2) You will then be presented with the configuration screen for that type of window and can amend the configuration settings to your requirements.



3) Press 'OK' to apply the changes and view the newly configured window.
4) Pressing the 'cancel' button at any time will abort the changes and revert back to the existing settings.

Viewing External data

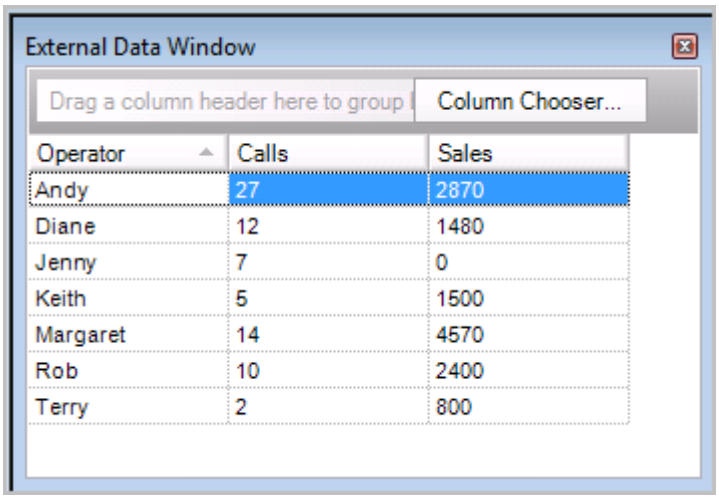
From the 'View->Miscellaneous' menu we can configure windows to view web based information or information stored in XML files or data sources such as a database.

External Data from an XML source

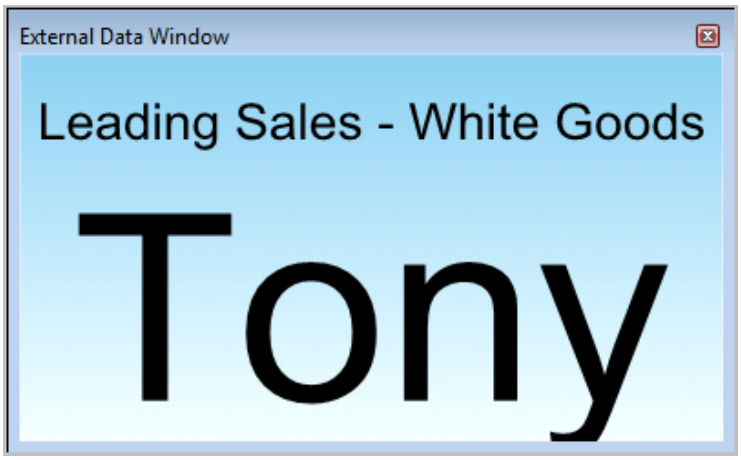
Viewing external data from an XML file allows you to display XML content either as a single item or as a grid. The system verifies the XML is valid and is capable of monitoring (watching) the file for any changes which occur within the file and updating the window with the latest data. This allows you to monitor such items as daily sales figures for instance. Alternatively you can set a timer which can update the window at preset intervals.

The same principles apply to data extracted from a data source. Data sources can be conventional databases such as Microsoft SQL Server or ODBC based data sources such as spreadsheet files, accounts applications etc.

Irrespective of whether you derive your data from an XML file or a data source the displayed information will be in tabular form (grid) or a single value.



External data displayed as a grid



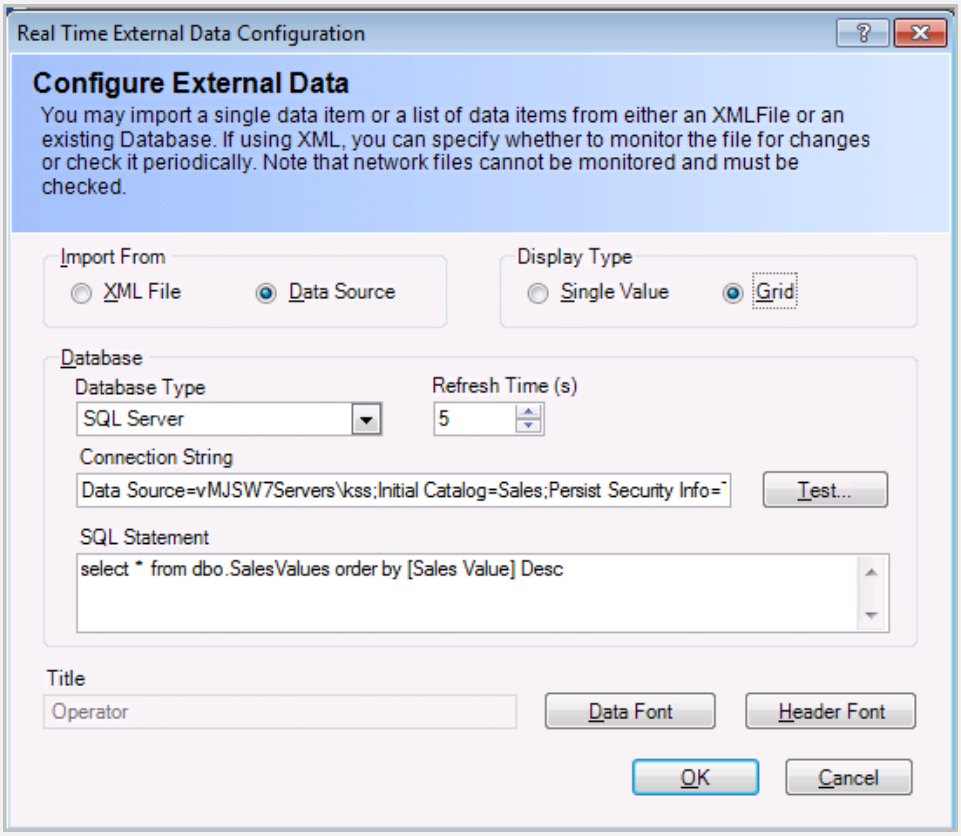
External Data displayed as a single value

Using a Data Source for your data

Where external data is derived from a data source the contents will be determined by an sql query. The query controls the source of the data and any ordering and filtering which needs to be applied. For a grid the column names will be determined by the column names of the query and the number of rows will match the rows returned from the query. It is reccomended that care be taken to ensure that the number of rows is kept to a small number to maintain performance. Where external data is displayed as a single value then the value displayed from a data source will be the first column of the first row returned in the SQL query.

How To: Configuring an external data source window

1) Select View->Real Time Information->Miscellaneous->External data
2) Select 'Create a New External Data View' from the right hand panel
3) Set up the configuration options as follows:


Real Time External Data Configuration
Configure External Data
You may import a single data item or a list of data items from either an XMLFile or an existing Database. If using XML, you can specify whether to monitor the file for changes or check it periodically. Note that network files cannot be monitored and must be checked.
Import From
XML File
Data Source
Display Type
Single Value
Grid
Database
Database Type
SQL Server
Refresh Time (s)
5
Connection String
Data Source=vMJSW7Servers\kss;Initial Catalog=Sales;Persist Security Info=
Test...
SQL Statement
select * from dbo.SalesValues order by [Sales Value] Desc
Title
Operator
Data Font
Header Font
OK
Cancel

4)
5) Import From: Data Source
6) Display Type: select Single value or Grid dependent on the type of window required
7) Database Type: Select SQL Server; OLE DB; ODBC; according to the type of data source you are deriving the data from.
8) Refresh Time: determines the time interval between database queries.
9) Connection String: Enter the text used to connect to your particular data source.
10) SQL Statement: Enter your SQL query here
11) Clicking the test button will check the connection and the query. If there is a problem then an error will be displayed, alternatively a message box will confirm the test was successful.

12) Title: If 'Single Value' has been selected then you may enter a heading for the window here. This will be overwritten by the column name if the test button is clicked.

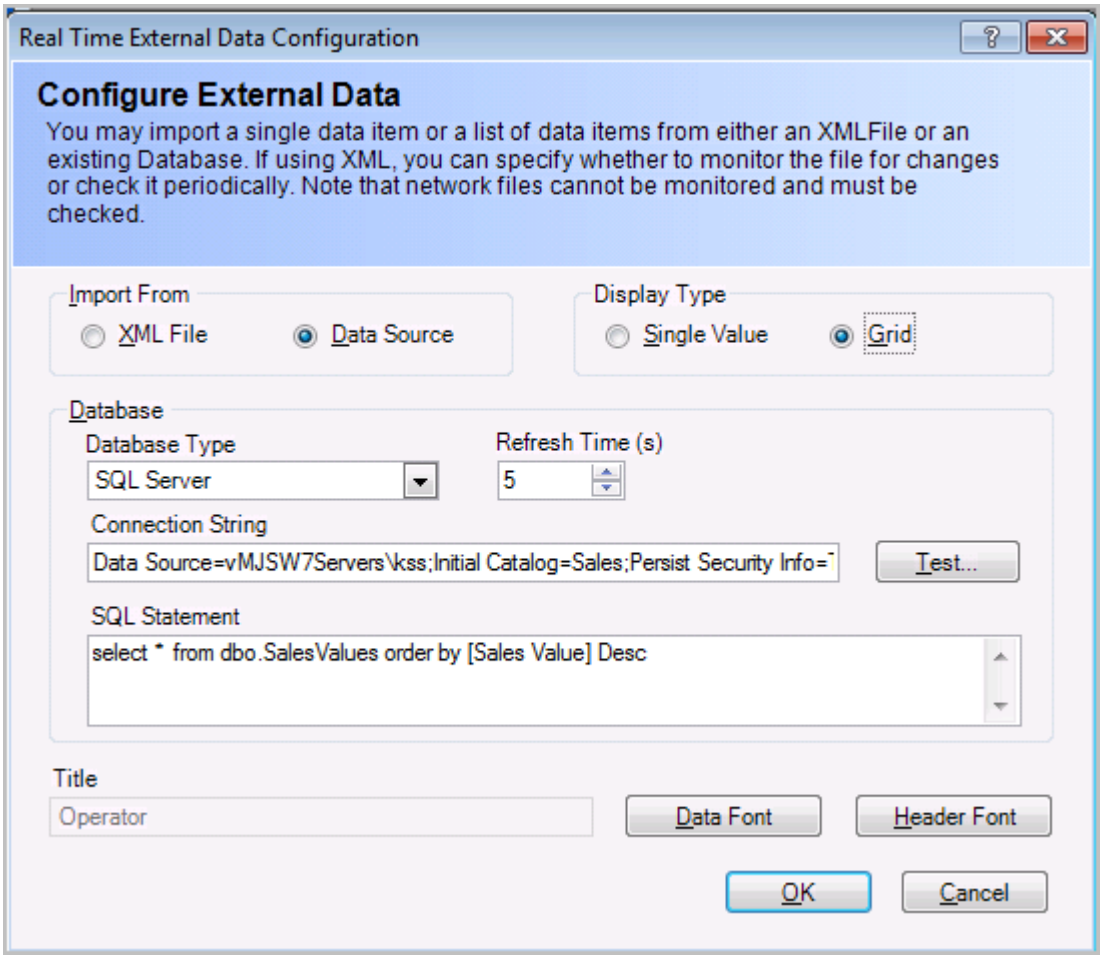
13) Click 'OK' to view your external data window

Example: Viewing the contents of an SQL Server database

To view data from an SQL server database you will neeed to enter a valid connection string and SQL query. The details of the connection string varies according to requirements but as a guide the following string contains the essential requirements

Data Source=[SERVER NAME]; Initial Catalog={DATABASE NAME]; User ID=[USERNAME]; Password=[PASSWORD]

The dialog below shows a typical setup.


Real Time External Data Configuration
Configure External Data
You may import a single data item or a list of data items from either an XMLFile or an existing Database. If using XML, you can specify whether to monitor the file for changes or check it periodically. Note that network files cannot be monitored and must be checked.
Import From
XML File
Data Source
Display Type
Single Value
Grid
Database
Database Type
SQL Server
Refresh Time (s)
5
Connection String
Data Source=vMJSW7Servers\kss;Initial Catalog=Sales;Persist Security Info=
Test...
SQL Statement
select * from dbo.SalesValues order by [Sales Value] Desc
Title
Operator
Data Font
Header Font
OK
Cancel

Example: Viewing the contents of an Excel file

Excel files can be used as a data source using an ODBC connection. You will need to generate an system ODBC connection using the windows ODBC data source utility (See Microsoft documentation on creating an ODBC connections). This defines the Excel file to be used as a data source.

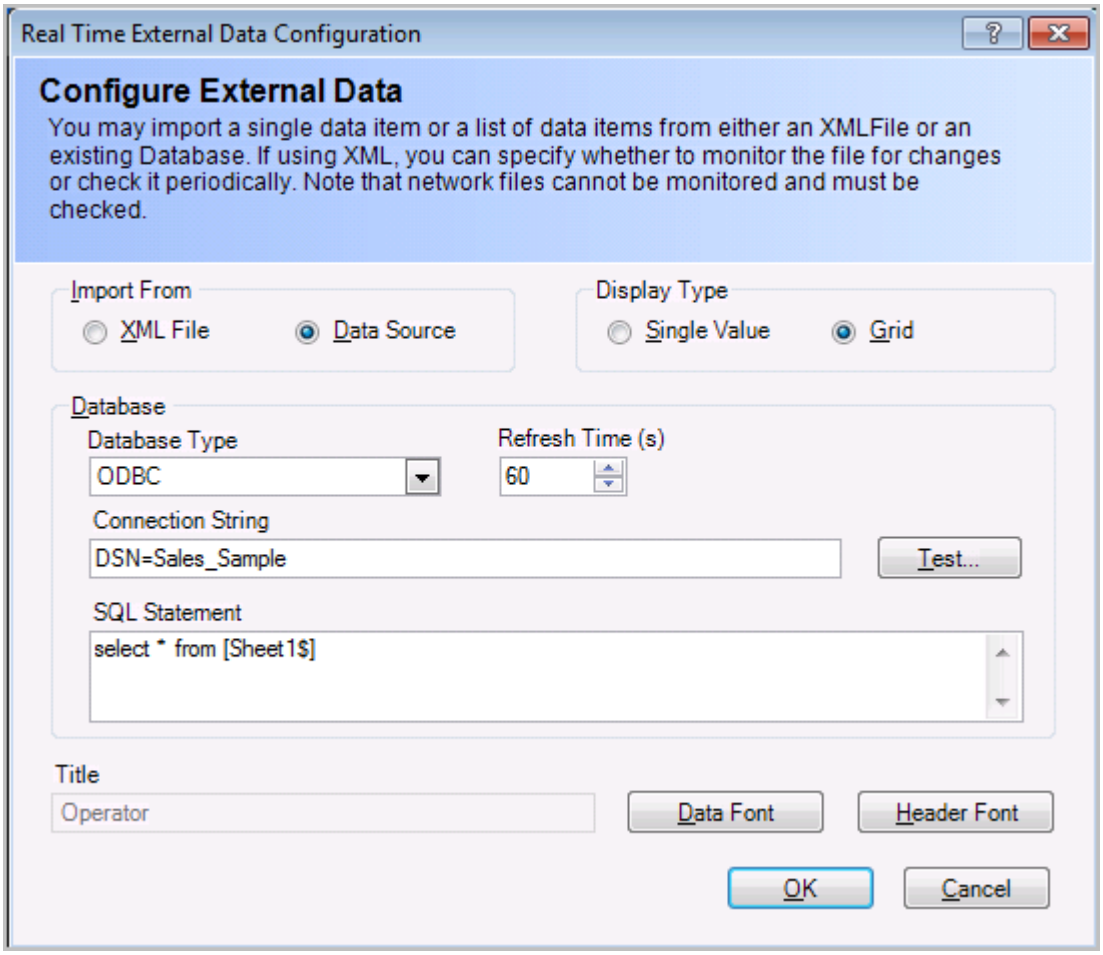
Having created the ODBC connection you simply need to specify the DSN name you have created as the connection string as follows.

DSN=[DSN NAME]

The sql query is specific to the excel data source but accessing a specific spreadsheet is as simple as specifying the following SQL

Select * from [sheet1$]

Where sheet1 is the name of the particular spreadsheet within the excel file.



Using an XML file for your data

If you are going to use an XML file as a source of data for your external data window then you will need to ensure that the file contains the correctly formatted and valid XML. The XML file cn contain both single value data definitions and multiple column data definitions.

The file must commence with a valid XML definition:

```
<?xml version="1.0" encoding="utf-8" ?>
```

All XML files must contain the following element

<DataValues>

If you are storing single values then the file must contain the following element

<SingleValue>

For each parameter which can then be viewed as a single value within a window you must define a <Param> Node as follows

```
<Param>
  <name />
  <value />
  <minvalue />
  <maxvalue />
 </Param>
```

There can be one or more <param> nodes the sub-nodes are:

Name: defines the name of the parameter.

Value: defines the value of the parameter.

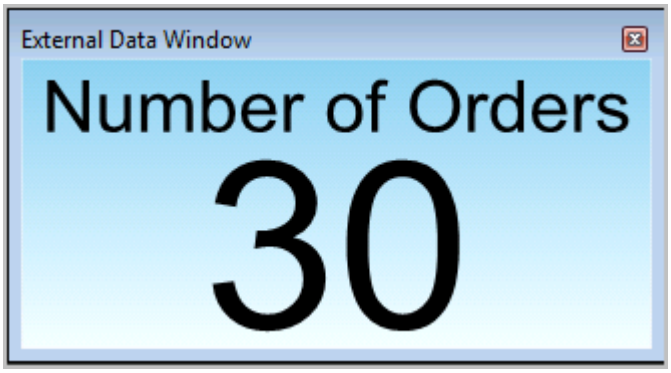
Minvalue and Maxvalue: define the limits of the parameter value if the value is numeric

The Single value definition would look like this:

```
<DataValues>
 <SingleValue>
    <Param>
       <name>Top Sales</name>
       <value>Tom</value>
       <minvalue>-1</minvalue>
       <maxvalue>-1</maxvalue>
    </Param>
    <Param>
       <name> Sales Value</name>
       <value>1000</value>
       <minvalue>-1</minvalue>
       <maxvalue>-1</maxvalue>
    </Param>
    <Param>
       <name>Number of Orders</name>
       <value>31</value>
       <minvalue>-1</minvalue>
       <maxvalue>-1</maxvalue>
    </Param>
</SingleValue>
</DataValues>
```

The resulting display could look like this.

You could also create separate windows for' Sales Value' and 'Number of Orders'



Multiple Column XML values

Multiple columns must contain the following nodes

First define the columns

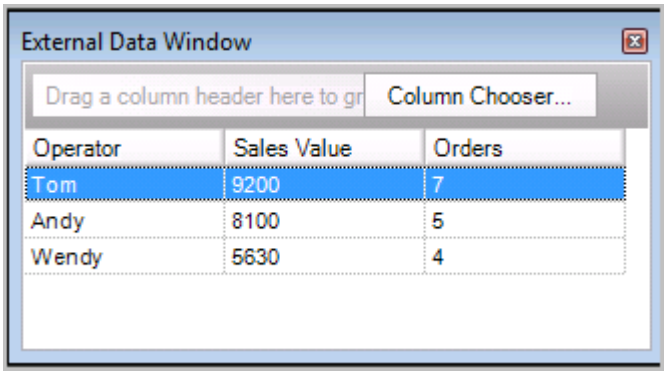
```
<GridValue>
 <Param>
  <name>Sales</name>
   <columns>
        <column minvalue="-1" maxvalue="-1" />
              <name>Operator</name>
        </column>
```

```
        <column minvalue="-1" maxvalue="-1" />
                <name>Sales Value</name>
        </column>
        <column minvalue="-1" maxvalue="-1" />
                <name>Orders</name>
        </column>
  </columns>
```

Then define the row content

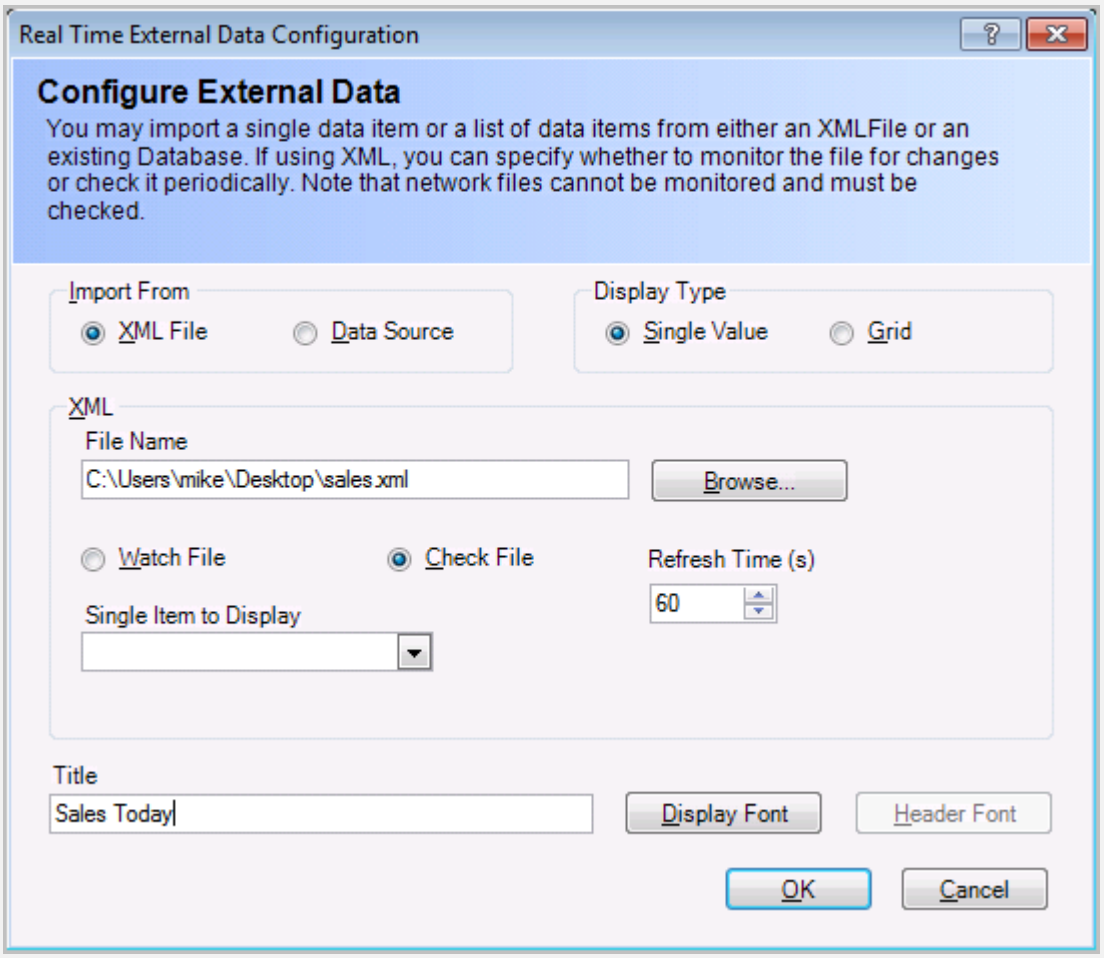
```
  <rows>
   <row>
     <value>Tom</value>
     <value>9200</value>
     <value>7</value>
   </row>
   <row>
     <value>Andy</value>
     <value>8100</value>
     <value>5</value>
   </row>
   <row>
     <value>Wendy</value>
     <value>5630</value>
     <value>4</value>
   </row>
  </rows>
 </Param>
</GridValue>
```

The resulting grid would look like this.



How To: Configure an XML external data window

1) Select View->Real Time Information->Miscellaneous->External Data
2) Select Create New External Data View



3)
4) **Select the parameters in the dialog as follows:**
5) Import From: XML
6) **For a single value windows select the following settings**
7) Display Type: Single Value
8) File Name: Browse for the XML file you are using as your data source
9) Watch File: Select if you wish changes to the file to be reflected in the window
10) Check File: select this if you want to refresh the file contents at intervals specified in the Refresh time setting
11) Single Item to Display: Select the Item to display in the window. This will be one of the 'param' names defined in the file.
12) Title: Define the window title

For a multiple column grid select the following values

1) Display Type: Grid
2) File Name: Browse for the XML file you are using as your data source
3) Watch File: Select if you wish changes to the file to be reflected in the window
4) Check File: select this if you want to refresh the file contents at intervals specified in the Refresh time setting
5) List to display: Select the list of values to display. The XML file may contain several <gridvalue> node sets.
6) Click 'OK'

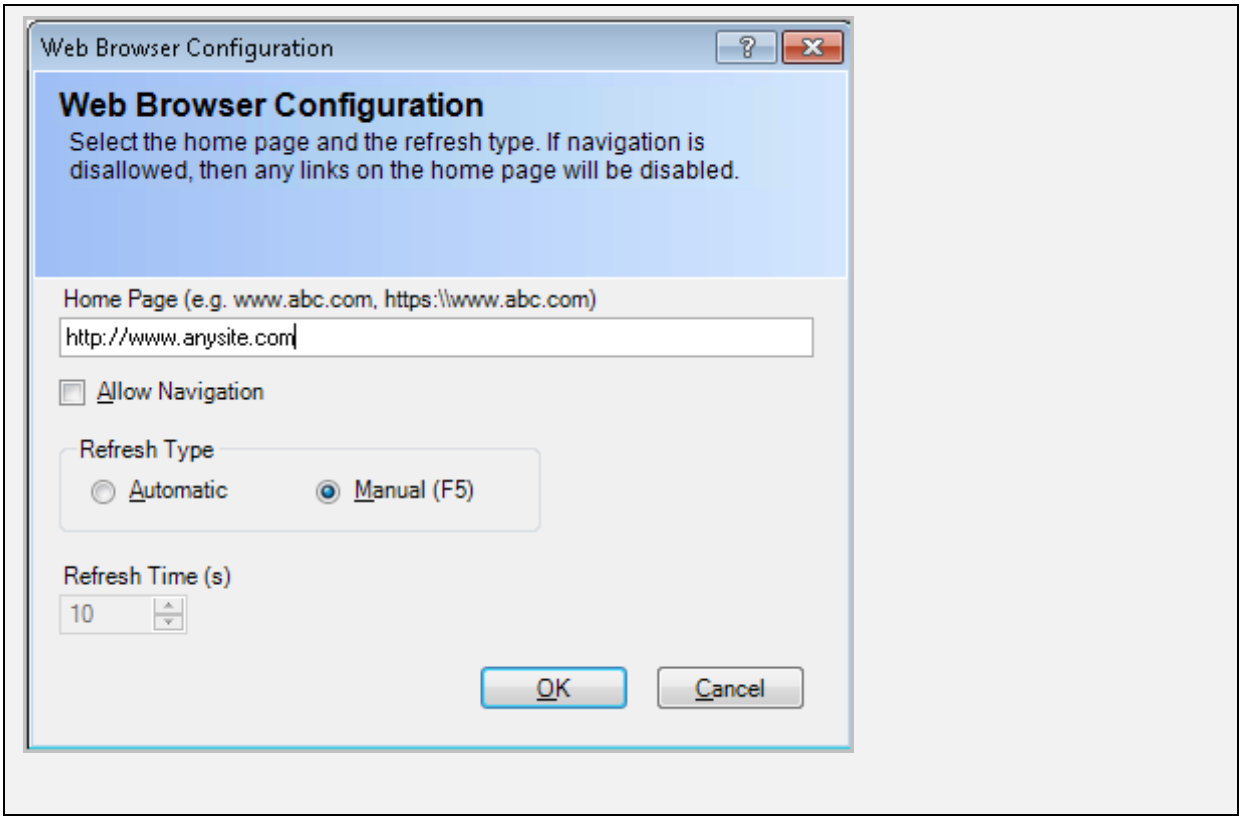
Web Browser

External Data Windows can be used to view websites which can be used to enhance the information visible on your wall board by displaying data from external websites or internal company intranets.

Configuration is very simple and you can include basic navigation which allows you to go back to your home page or track backwards or forwards between pages you have visited.

How To: Configure a web browser window

1) Select View->Real Time Information->Miscellaneous->Web Browser
2) Select 'Create New Web Browser'
3) Home Page: Enter the web address of the page you wish to view
4) Allow Navigation: displays back, forward and home navigation
5) RefreshType: Automatic refreshes the page according to the refresh time setting, Manual requires user to manually refresh the page.



A Configured Web Browser window

Chapter 7

Call Recording

The MyCalls system provides access to call recordings using the Calls list on the front screen. From the calls list you can see at a glance any calls which have been recorded and you can playback these calls on the desktop simply by clicking the call playback icon (see below).

Enabling Users for Call Playback

Any MyCalls user can be enabled for call playback. By default if no users are created in MyCalls, you will be able to playback all calls. Once users have been created then anyone logging into MyCalls as a user will have certain rights and restrictions dependent on their user type and where they appear within the organisational hierarchy.

The steps required to ensure call recording can take place for a given set of users are as follows:

- Create your users and user groups*
- Assign each user with a Role
- Assign your users to their respective organisational groups
- Assign each user a default extension
- Assign each user a login/pin if required**
- Enable the user for Call-Recording
- Configure any Call-Recording rules

The rules governing the playback of calls

Any users that are created and want to play back calls must be enabled for call playback

A normal User can listen to their calls only

An Agent Desktop user can listen to their calls only

A Wallboard user can not listen to any calls

A Supervisor can listen to any calls within their organisational group and any sub group

An ACD Supervisor can listen to any calls within their organisational group and any sub group

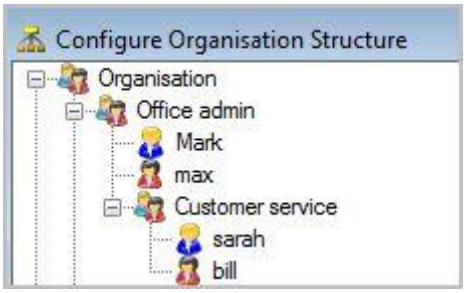
A PBX Administrator can listen to any calls on their PBX

An Enterprise administrator can listen to any calls on all PBXs

The above rules can be overridden by applying call recording rules to Callers, Users, Extensions, Trunks, DIDs and call types.

To ensure call recordings are only visible to users with appropriate permissions it is important to setup the organisational hierarchy correctly. In the example below, the highest level group is called Office admin and in that group, there is a Supervisor (Mark). The supervisor can playback any calls from office admin and customer service.

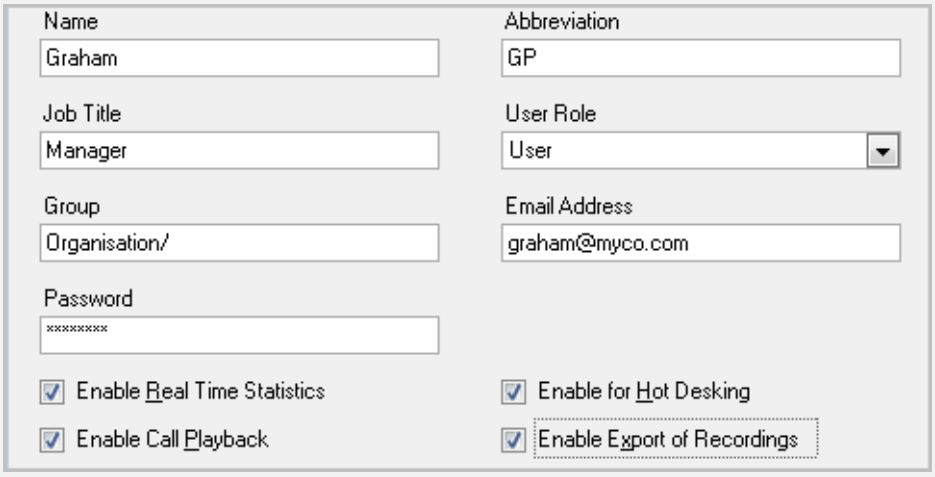
The Supervisor in customer service (Sarah) however, can only playback calls in the customer service group.



For the Hierarchal user structure to work correctly, the users must be assigned to extensions. To assign a user to an extension, go to configure / telephone system and edit an extension. The user is only assigned to calls on that extension from the time the extension is assigned to them.

How to: Enable a User for playback

1) In Configure -> Organisation click 'Create New User' or 'Edit an Existing User'



2) To give a user the ability to playback calls, check the 'Enable Call Playback' box
3) To give the user the ability to export calls click 'Enable Export of Recordings'
4) Click 'OK' to save any changes.

*For more details on users and groups see the Organisation configuration section

** For more details on login/pin configuration see the Telephone system device configuration section

Restricting Call Playback

To enable or disable the recording of certain types of calls or calls made to or from certain parts of your organization you can define recording rules. These rules enable or disable specific devices, users and call types from being recorded. This allows you to override the normal rules governing users as described above. However recording rules cannot enable a user to listen to a wider range of calls than their position in the organisation allows. For example a user can only ever listen to their own calls however you could specifically disable calls on an extension within a group from being recorded.

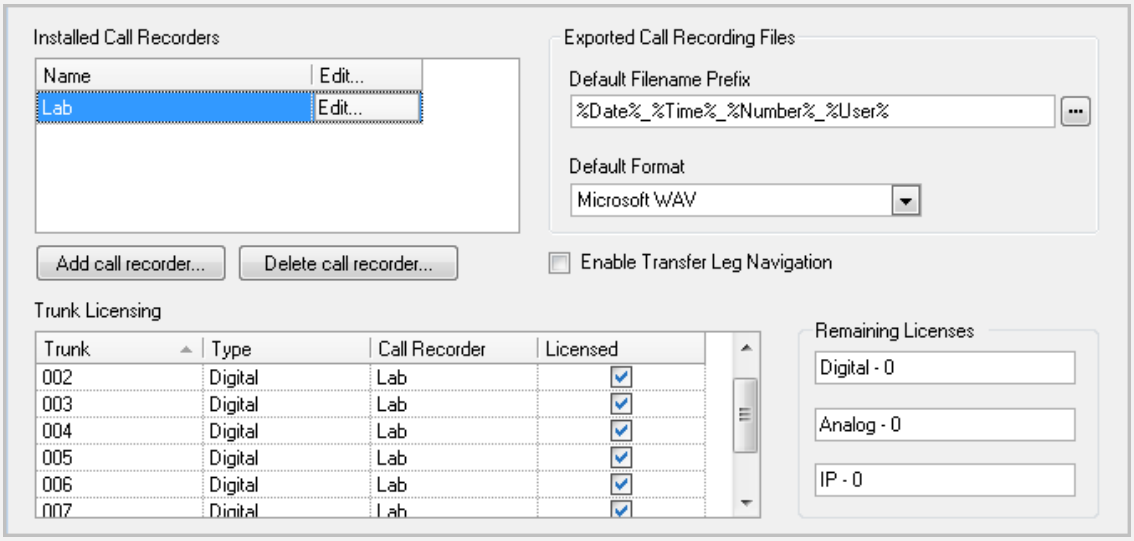
How To: Configure Call Recording Rules

1) From the menu select - Configure -> Telephone system -> PBX -> Call Recording

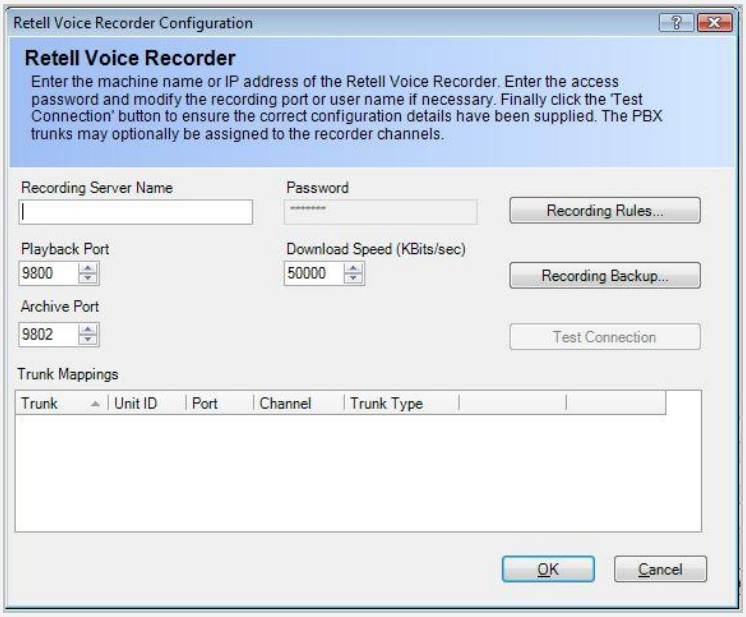
2) Select the 'Edit Call Recorder' Configuration

3) The 'Edit Call Recorders' window will be displayed – select the 'edit' button for the recorder for which you wish to set rules

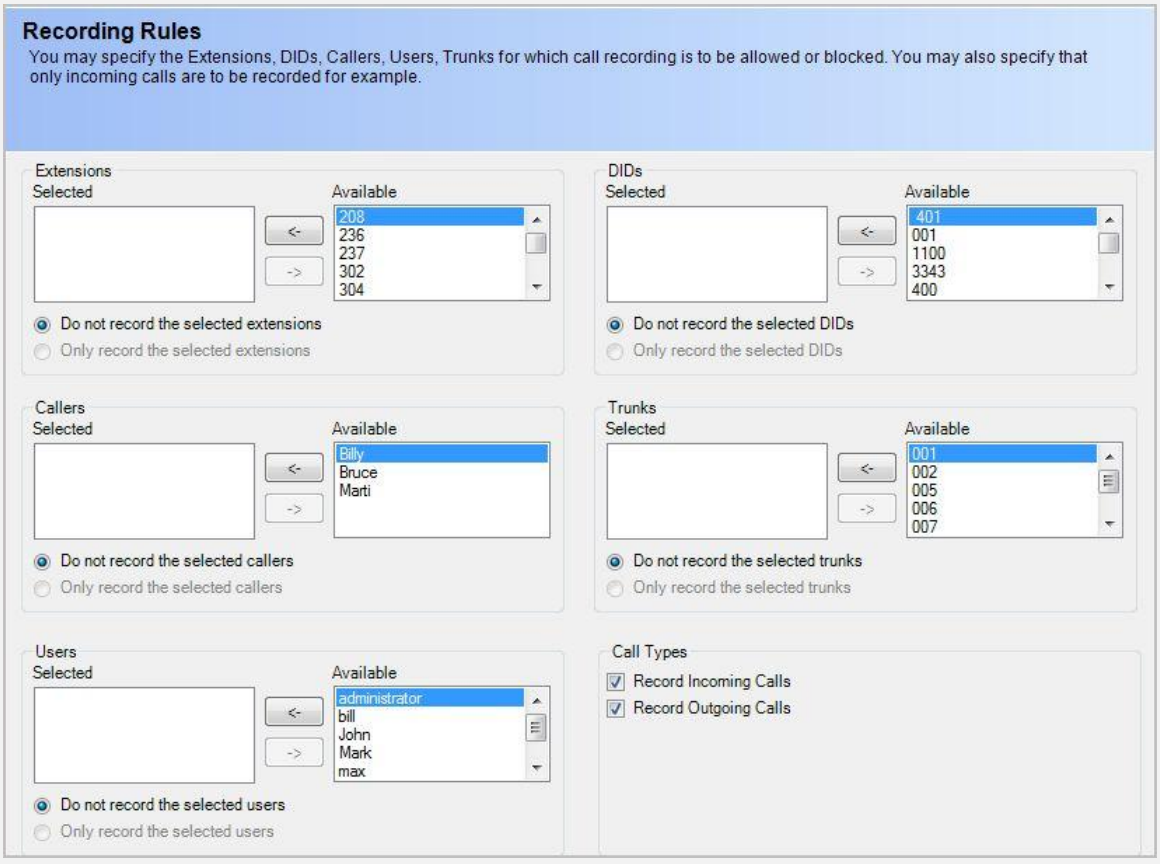
4)



5) From the call recording configuration page click 'Recording Rules'

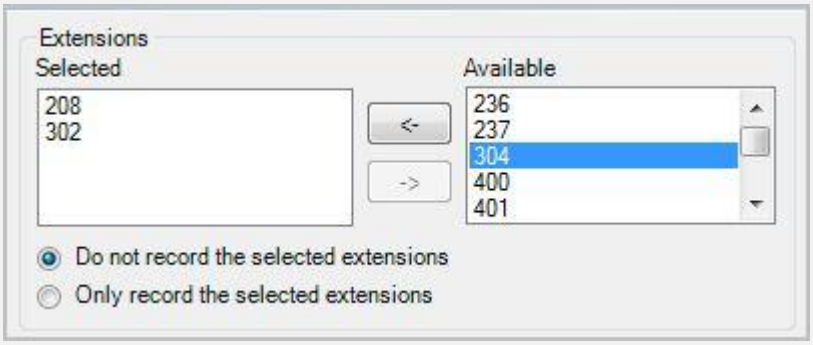

Retell Voice Recorder Configuration
Retell Voice Recorder
Enter the machine name or IP address of the Retell Voice Recorder. Enter the access password and modify the recording port or user name if necessary. Finally click the 'Test Connection' button to ensure the correct configuration details have been supplied. The PBX trunks may optionally be assigned to the recorder channels.
Recording Server Name
Password
Recording Rules...
Playback Port
9800
Download Speed (KBits/sec)
50000
Recording Backup...
Archive Port
9802
Test Connection
Trunk Mappings
Trunk
Unit ID
Port
Channel
Trunk Type
OK
Cancel

6) The Recording Rules dialog is displayed and you can define rules for enabling or disabling calls.



7) Extensions, DIDs, Callers, Trunks and Users can all be included or excluded from being recorded as required.

How to: Set up recording rules for Extensions



1) Add devices to the 'Selected' list by selecting them in the 'Available' list and clicking
2) Choose 'Do not record the selected devices' or 'Only record the selected extensions.'

You can also decide to include incoming only, outgoing calls only or both.

Using the Call Playback Interface

Once logged into MyCalls the calls list will provide access to the recorded calls. The leftmost column of the calls list provides an Icon to indicate the call recording status.

'No Icon' indicates there is no recording for that call

'A plain speaker icon' indicates a recording has been matched to the call

'A greyed out speaker icon' indicates a recording has been matched to the call but the recording has been disabled

'A speaker icon with a red cross' indicates a recording has been matched to the call but the user is barred from playing back the call

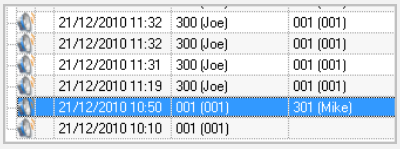
'A speaker icon with a red cross and a green arrow' indicates the call is a transferred incoming call, a recording has been matched to the call but the user is barred from playing back at least part of the call

How To: Select and Playback a call

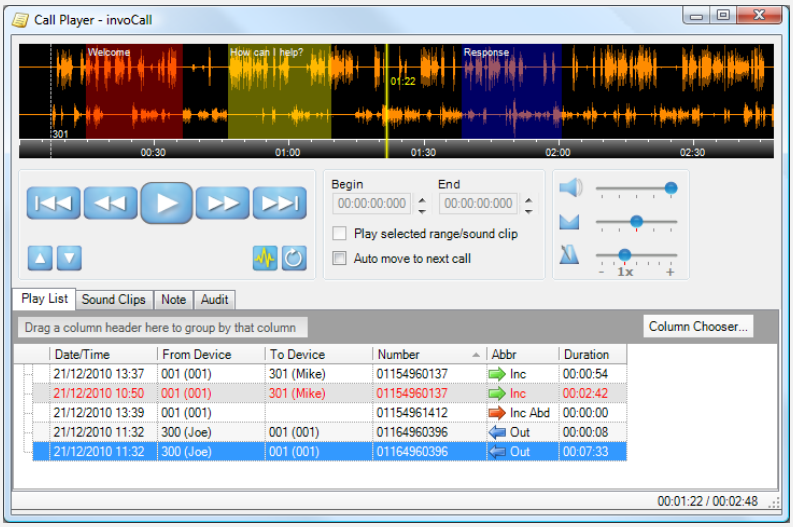
1) From the 'view' menu select 'Call Records View' or select 'Calls' from the toolbar at the bottom left side of the screen:

2) By default the call records view will display the last 50 calls for the current day. Calls that have been recorded will show a speaker icon meaning they have been recorded.

3) To play a call that has been recorded, simply double click the speaker icon located in the far left box to play the call.



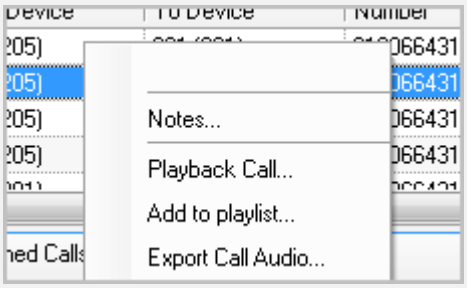
21/12/2010 11:32	300 (Joe)	001 (001)
21/12/2010 11:32	300 (Joe)	001 (001)
21/12/2010 11:31	300 (Joe)	001 (001)
21/12/2010 11:19	300 (Joe)	001 (001)
21/12/2010 10:50	001 (001)	301 (Mike)
21/12/2010 10:10	001 (001)	



4) After you have double clicked the speaker, the player will load and play the call. At the same time the new call will be added to the playlist.

5) The currently playing call or call leg is displayed in Red.

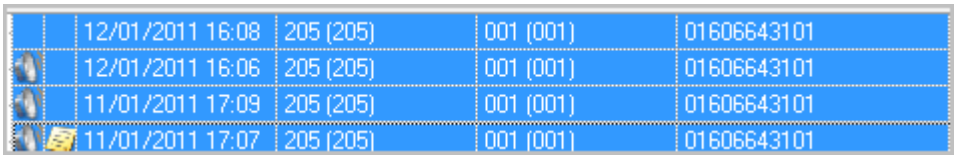
6) Right clicking on the calls view will also allow you to playback a call by selecting the Playback Call item from the menu.



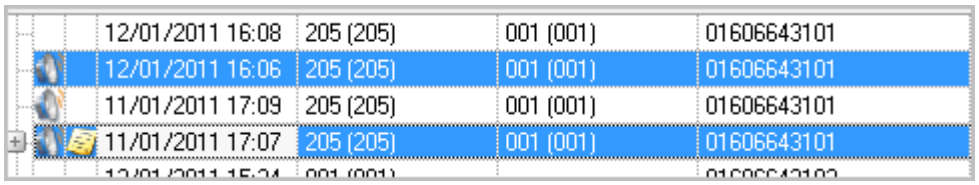
Multiple call selection

You may select several calls from the calls view listing.

To select a range of call click on the first call required from the list and then hold down the shift key and click on the last call required. All calls between the first and last calls will be selected.



To select several individual calls click on each call whilst holding down the Ctrl key.



The Call Player

MyCalls provides a desktop player specifically designed for call recording and playback. The player provides the following functions

- Play/Stop
- Fast forward/Rewind
- Overall Volume
- Adjust relative volume between each call participant
- Change speed of playback without affecting pitch to clarify what was said
- Create selections and store as sound clips
- Set the start and endpoints of a selection as either a time or via mouse selection
- Loop round selections or complete calls
- View transfers as separate sections of a call
- Navigate between sections of a call
- Play next and previous sections of a call
- Create playlists of complete calls
- Play next/previous call in playlist
- Create notes for calls
- Auditing of playback and export activity
- Export of audit logs
- Export of calls

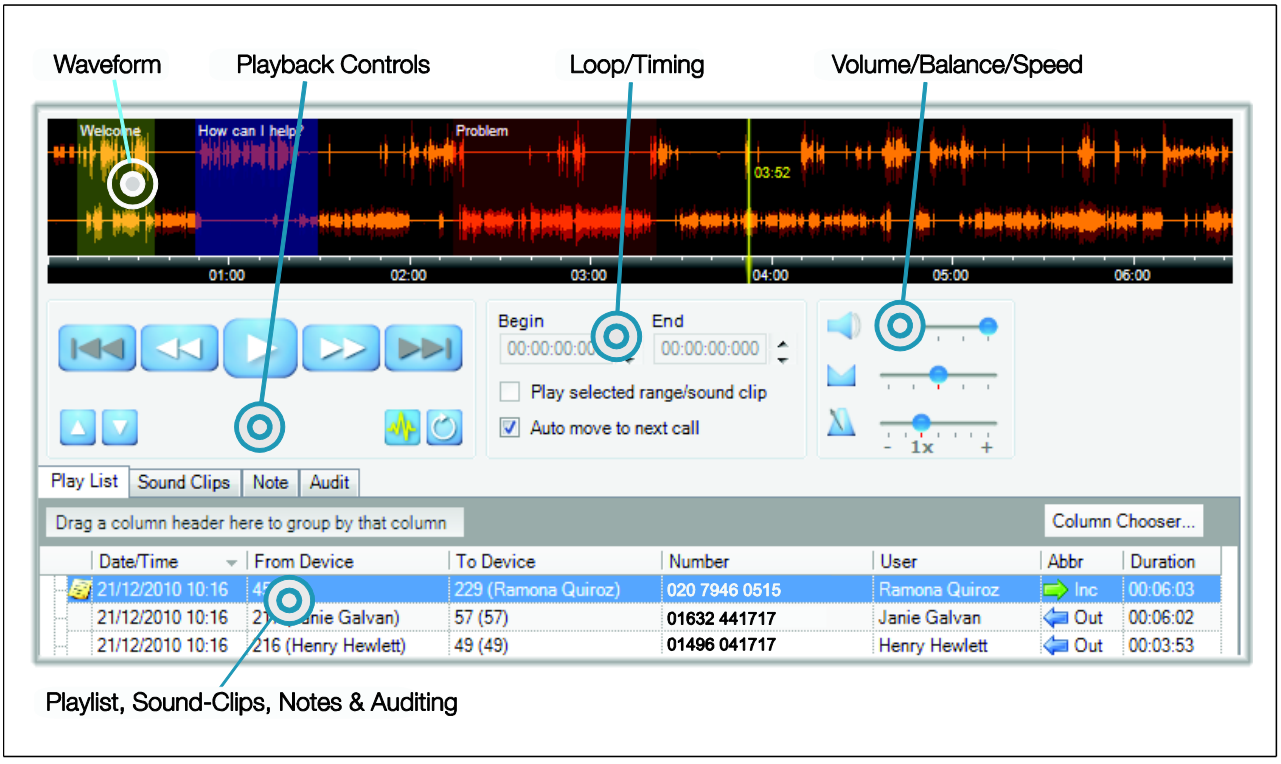
Feature Configuration

You may not have all the features of the player available. The call player feature configuration is determined by the license as follows.

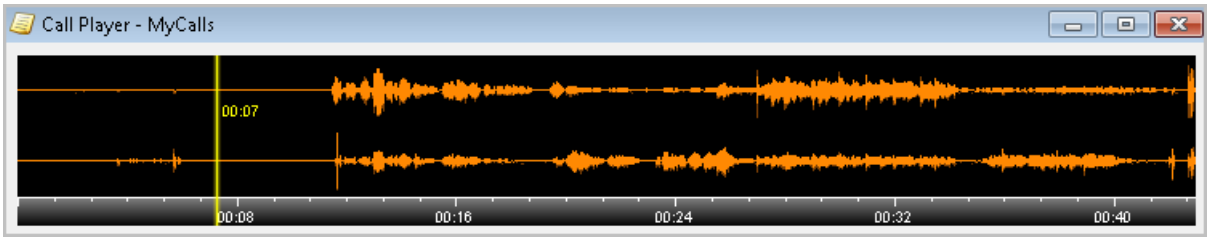
	Waveform Display	Sound clips	Section markers	Single call recording export	Bulk call recording export	Volume, Balance, Playback Speed	Call Audit
Basic				✓			
Enhanced	✓	✓	✓		✓	✓	
Enhanced+Audit	✓	✓	✓		✓	✓	✓

Call Playback

When a call is selected for call playback it is added to the playlist. Double clicking the speaker icon from the call records list launches the player and commences call playback. Control of playback is via the playback buttons.

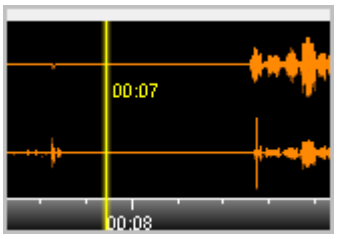


Call Player Waveform



The call player can display a waveform representing the recorded call. This option is licensable and only available with the enhanced call player. If the product is licensed as a basic configuration then a compressed waveform window will be visible but no actual waveform trace will be shown. With the enhanced player a full two channel waveform is visible.

When a call is played a yellow cursor line will move across the waveform window indicating the position of the playback point. The cursor also displays the elapsed time in minutes and seconds from the start of the call. If the call length is greater than 1 hour then hours and minutes will be shown.



The bottom of the waveform window shows the time base of the call and this is scaled automatically to match the call length.

The player can playback the whole call or selected parts of the call. Whether you are using the player in basic or enhanced configuration selections can be made from the waveform window in the same way.

How To: Make a selection in the waveform window

To make a selection from the waveform window simply click and drag the mouse along the waveform window.

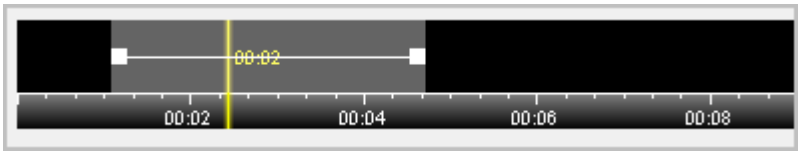
The selected area will show up as a grey block.

Release the mouse and the selection will be displayed along with a selection control bar which appears as a white line with a grab handle at either end of the selection.

Selecting the control bar in the centre will allow you to move the selection left or right.

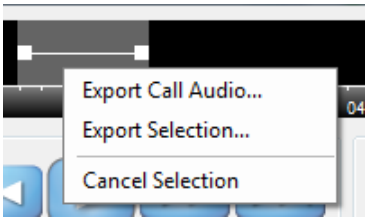
Selecting either of the grab handles will allow you to adjust the start or end point of the selection independently.

Clicking within the selection but away from the selection control bar causes the playback cursor to move to the mouse position.



Basic Player showing selection but no waveform

To cancel a selection simply right click the selection and pick 'Cancel Selection' from the context menu.



Creating a sound clip (Enhanced player only)

Once you have created a selection it can be turned into a sound clip. Sound clips can be named and are automatically saved into a sound clip list when they are created.

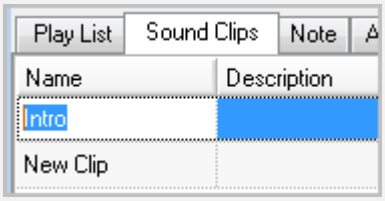
How To: Create a new sound clip

To create a new sound clip right click a selection and select 'Add to sound clips' from the context menu.

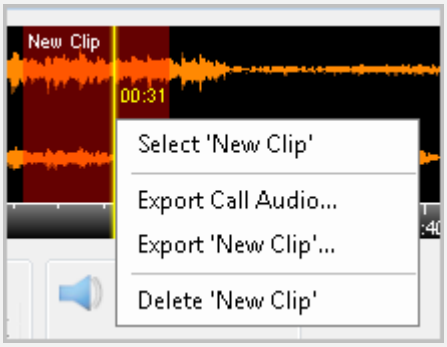
This will place the sound clip into the sound clips list with a default name of 'New Clip'.

The name of the clip is displayed in the waveform window so each clip is easily identifiable.

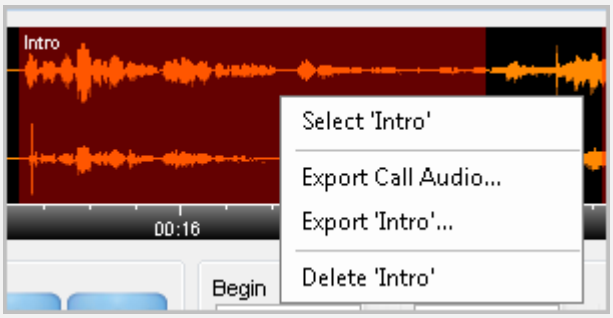
The name of the clip can be changed from the 'sound clips list' by selecting the name of the clip and typing the new name over the selected text (see 'sound clip list' section).



A sound clip can be selected and manipulated just like a normal selection by right clicking over the sound clip and selecting "Select 'New Clip'" from the menu (New clip is replaced with the name of the clip to be selected see below).

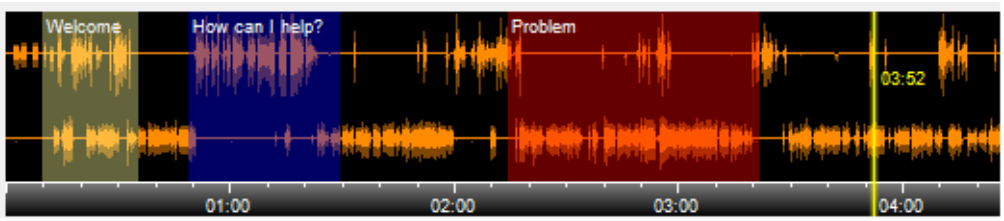


Selecting a new clip



Selecting a clip named 'Intro'

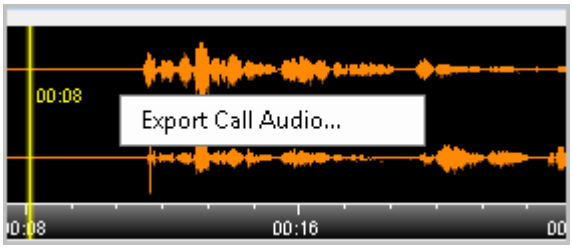
To delete a sound clip right click the sound clip waveform and select Delete [Clipname] from the menu.



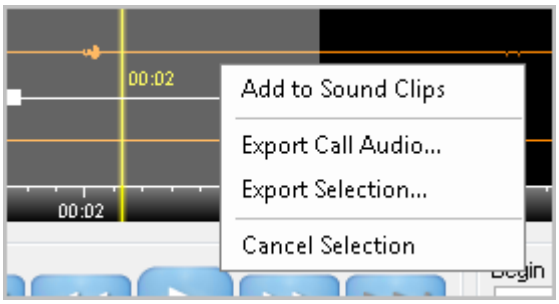
Enhanced player with full waveform and multiple sound clips

Exporting Audio

The waveform window provides a mechanism to export the call audio to either WMA or WAV file format. Right clicking on any part of the window will give you the option to export the whole call.

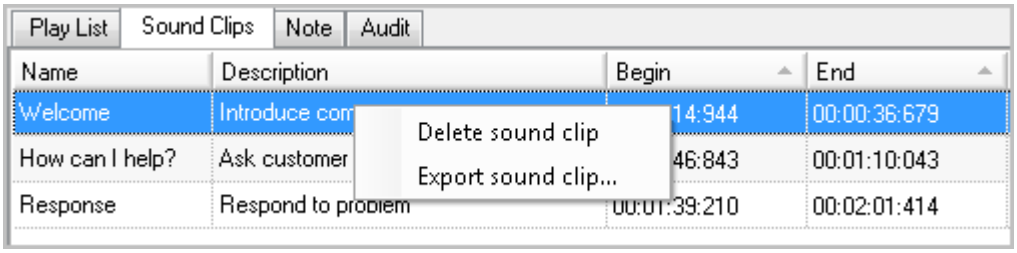


Right clicking on a selected area of the call will allow you to export the selection.



Calls can also be exported directly from the Calls View list on the main MyCalls screen.

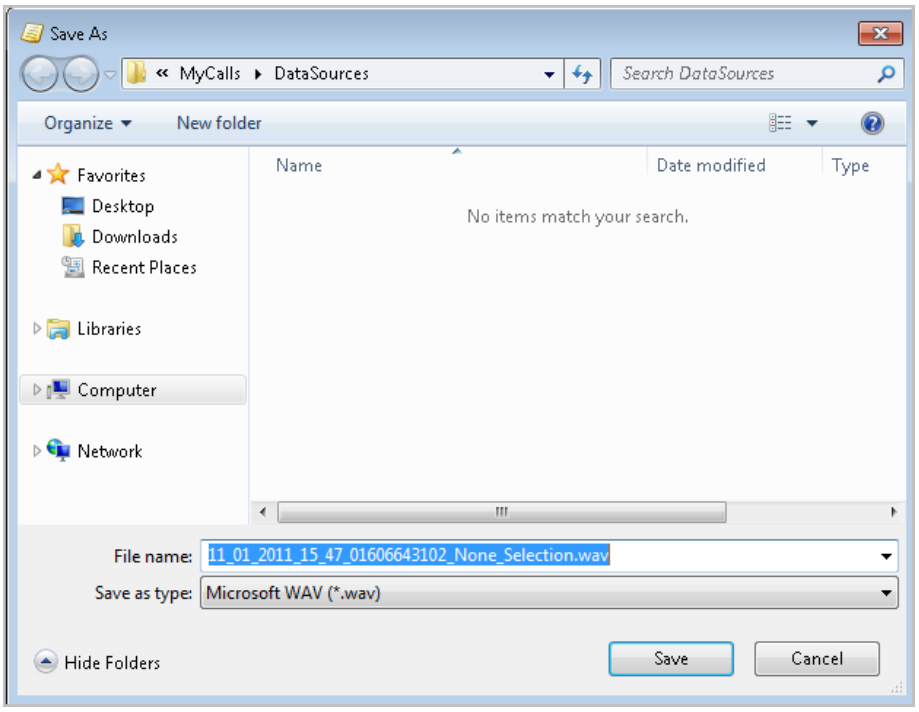
If you have created a sound clip then right clicking the sound clip allows you to export the sound clip as a WMA or WAV file. Sound clips can be exported from the sound clips grid using mouse right click and selecting 'Export sound clip' from the menu.



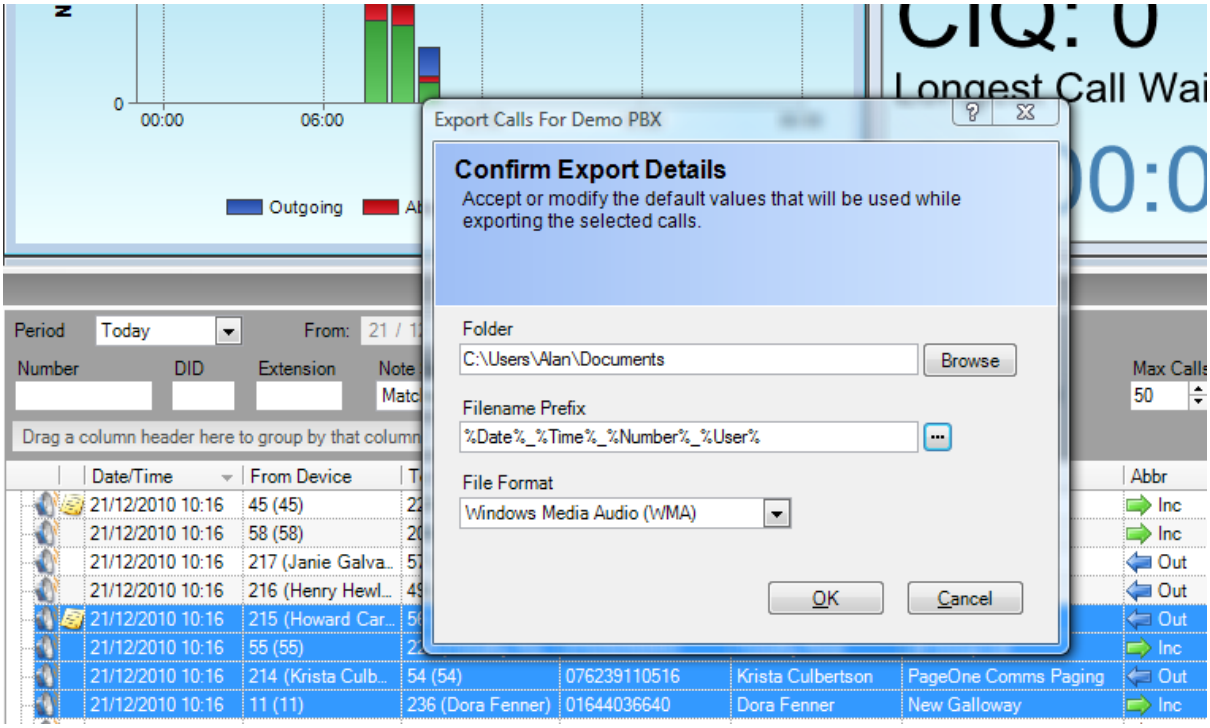
Call audio can be exported by using the right-click menu in the following locations:

- Main call list
- Any Playlist
- Sound Clip list
- Waveform window

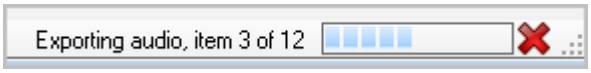
Selecting either 'Export Call Audio', 'Export Selection' or 'Export sound clip' opens a dialog box and you can choose where to save the file and select the format. The default filename is determined by the call recording configuration. The file format can be selected from the 'Save as type' drop down box.



You can export audio for single calls or multiple calls. To export multiple calls simply select the required calls from the calls view or playlist, right click on the selections and click 'Export Call Audio'. When exporting multiple calls the dialog will be slightly different as shown below and export progress will be visible in the status bar for each call (the status is also visible for single calls but only usually visible on longer calls).

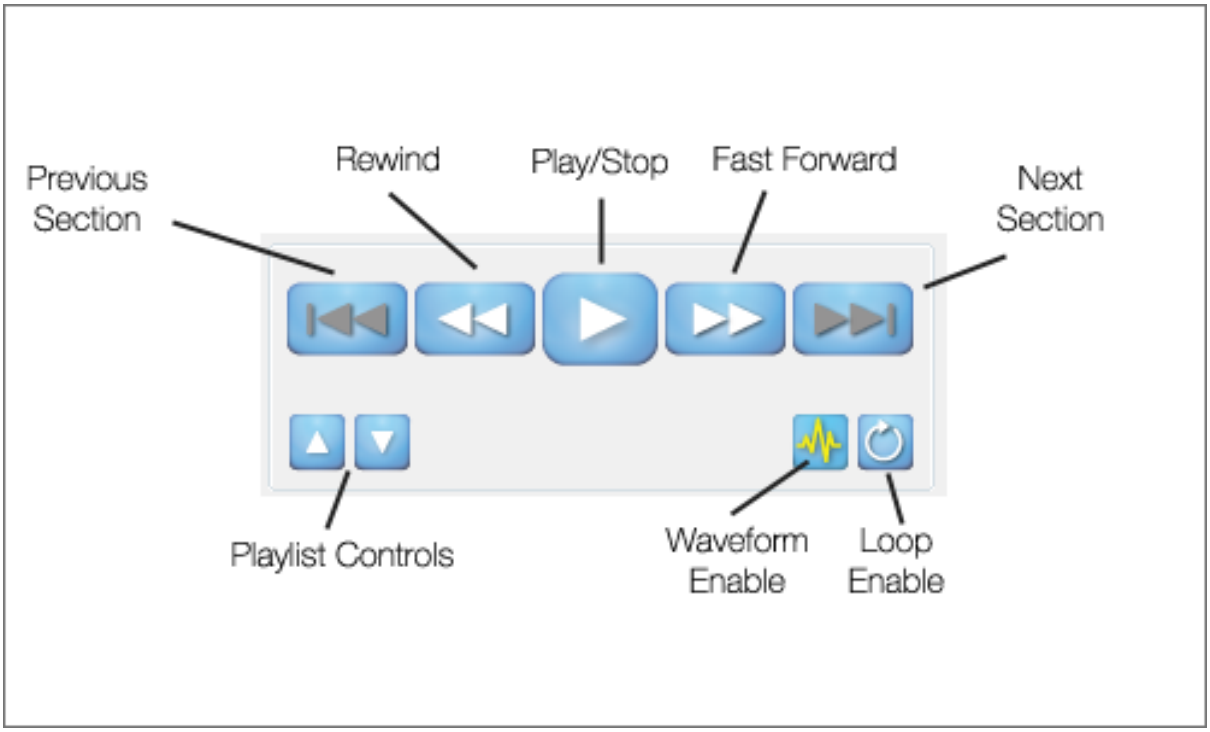


Multiple selection export dialog



Export Status

Playback Controls



The playback controls are as follows:

- Play/Stop: operates the playback of the call, click to start playback, click again to pause, playback will then continue from that point.
- Rewind: Click and hold will rewind the cursor, single click will set the cursor back at the state of the call.
- Fast Forward: Click and hold to fast forward the call.
- Previous Section/Next Section: Calls contain various sections as follows:
- Ring: This is at the start of the call and is determined from the ring duration
- Answer: This is the main part of the call
- Transfer: This is determined when a call is transferred to another extension

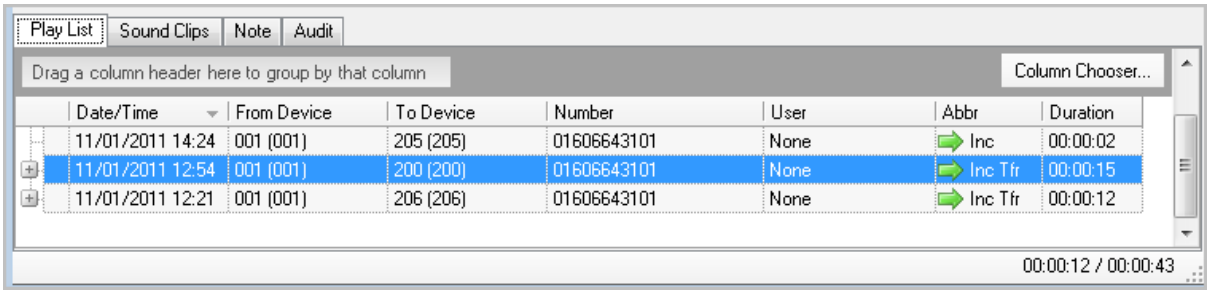
NB: The sections of a call are determined from values within the SMDR and may not be available on all telephone switches. An option is available in the call recording configuration (see call recording configuration) to disable call sections, in which case these buttons are greyed out indicating they are disabled (as in the picture above).

Waveform Enable: Enables or disables the display of the waveform. Disabling the waveform allows you to quickly scroll through a playlist without having to wait for the waveform display to update between each call selection.

Loop Enable: Allows you to loop a complete call or a selection.

Playlist controls: These buttons allow navigation of the playlist items and sound clip items (see playlist and sound clips section).

Call Player Management Panel



The call player management panel allows you to manage Playlist, Sound Clips, Notes and Audits. Select the type of item you wish to manage from the tabs below.

Playlists

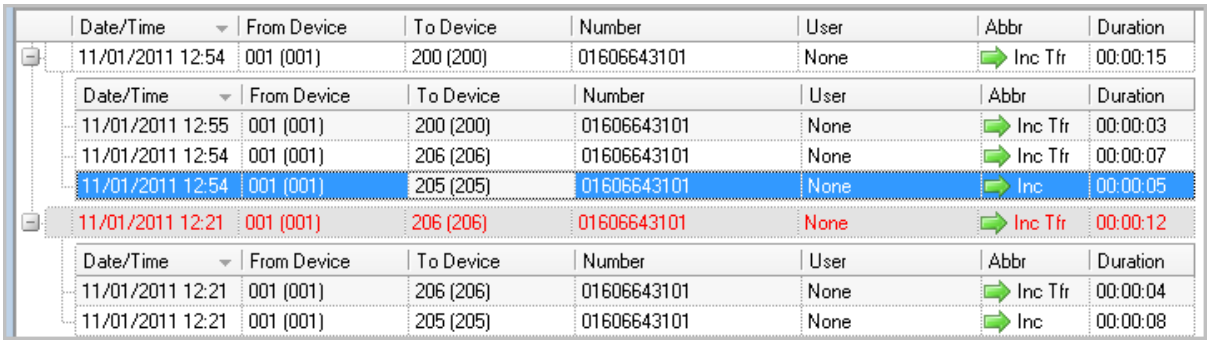
Playlists contain a list of calls selected from the main call records list. A playlist will remain in the player as long as the MyCalls client application is running. When a call is selected and played it is added to the current playlist. Calls can be added to the playlist using one of the following methods:

- Double click the speaker icon
- Right click on the call and select 'Playback Call', this will automatically play the call as well
- Right click on the call and select 'Add to playlist'
- Click and drag a call from the call records to the playlist. The player needs to be open in order to use this method.

Only calls with a valid speaker icon can be added to the playlist.

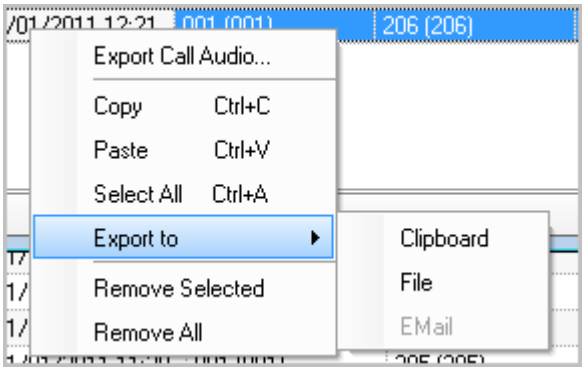
Calls can be removed from the playlist by right clicking the call within the list and selecting 'Remove-Selected' from the context menu.

Calls which contain multiple transfers (multi leg calls) are shown with a plus symbol next to the call. Clicking on the plus symbol expands the call and allows you to select a specific call-leg.



You can see in detail which extensions have participated in the call and how long each leg of the call lasted.

Selecting either the main call record or any leg of the call will cause that call to be loaded into the player and played back from the start of the call. The currently selected call or call-leg is displayed in red.



Right clicking a call in the playlist gives the following options

Export Call Audio: In the same way as selecting this option from the waveform menu

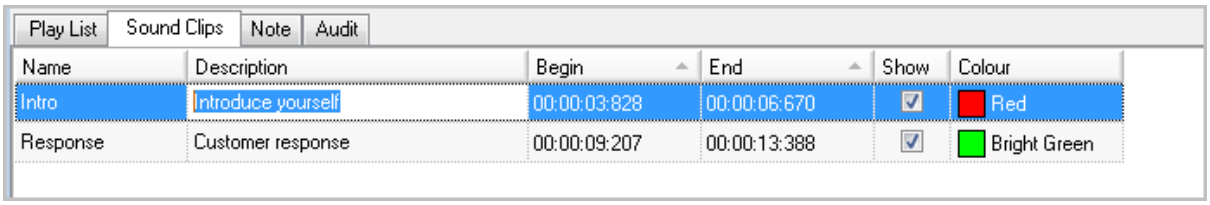
Copy: Copies the call details to the clipboard for pasting into a document or report

Select All: Select all calls in the list

Export to File/Clipboard/Email: exports the contents of the selection to a text file, clipboard or email. Email recipients must be configured into the application.

Remove Selected, Remove all: Remove items from the playlist.

Sound Clips



Any sound clips which have been created are listed under the sound clips tab. Each sound clip can have a name, description, start and end point, and a colour. There is also an option to show or hide the clip in the waveform window.

Sound clips are associated with a specific call and will remain in the list until the associated call is deleted from the playlist.

How To: Edit Sound Clip Details

Single click on the 'Name',' Description',' Begin' or 'End' column for the sound clip.

This will select the sound clip within the waveform window and select the text or time value for editing.

For text columns Name and Description simply enter the text required. For Begin and End times enter the times required.

Colour selection can be changed for a sound clip by clicking on the colour column and selecting a new colour from the palette.

Notes

A note can be added to a call either in the playlist or from the call record view. The notes can be viewed by selecting the Note tab within the player. Any changes to the notes must be saved by clicking the save button.

The Created by, Created date and Last modified by fields are automatically populated based on the logged in user.

Audits

It is useful to know what has happened to a particular call after it has been recorded. The MyCalls playback audit system logs events associated with the following aspects of a call recording:

- Playback: Logs activity every time a call is played back
- Export: Logs all call export activity
- Clip: Logs Sound clip creation, name changes, deletion.
- Configuration Changes: Logs changes to the call recorder configuration

Each Audit record is read only and contains the following information:

- Start/Finish date and times of the audited activity.
- Audit Type: Identified the type of activity e.g. Playback.
- User: The logged on user who carried out the activity.
- Description: A pre-defined description of the activity.

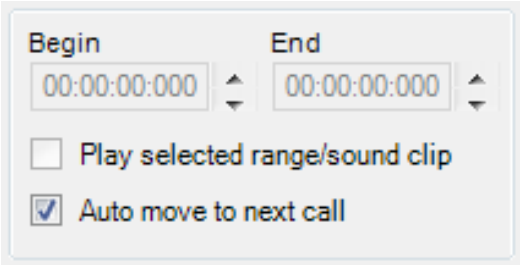
Additional Controls

Two other panels are available with additional controls.

Selection and Sound control start and end times can be adjusted using the Begin/End controls

Play Selected range/Sound Clip limits playback to the currently selected area of the waveform panel or the currently selected sound clip.

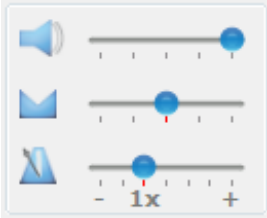
Auto Move to Next Call causes the player to automatically load and play the next call in the playlist once the current call has finished playing.



Volume: Adjusts overall volume of the player.

Balance: Adjust the relative volume between the recording channels of the internal and external party can be adjusted.

Playback Speed: Where 1X is normal playback speed and can be adjusted faster or slower + or –



Finding Recorded Calls

For fast retrieval of calls for playback you can use the quick search from the calls grid options. Quick search is the easiest way to find a call by CLI, DID, Extension or Note-text.

Quick Search

From the 'view' menu, click 'Call record view'. The quick search is highlighted below; by default it shows the last 50 calls for today. To change the date to search on, select from the list in the 'Period' drop down menu. To enter specific dates, choose custom and enter your dates and times as required.

The next line down allows you to search for a particular telephone number, DID and extension. You can enter partial numbers to search on e.g. 01270 would find any number containing '01270'. Entering both a Number, DID and an Extension will search for calls containing all items in the one call.

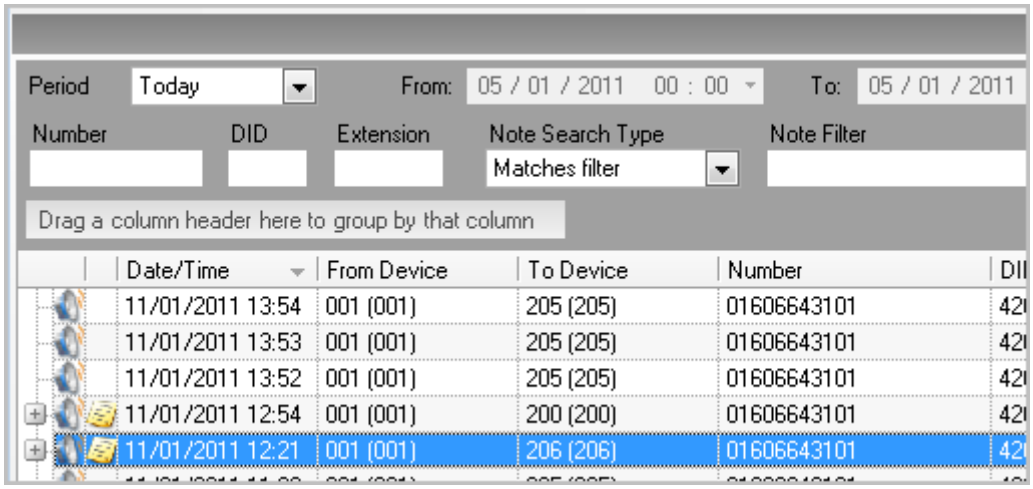
You can also search using the notes field. The Note search type can be set to one of the following:

Matches Filter: Finds all notes where the note contains text matching whatever has been entered in the Note Filter textbox.

Has a note: Finds all calls which have a note attached.

No Note: Finds all calls with no note attached.

You can also choose which call types to include and the maximum number of calls to display.

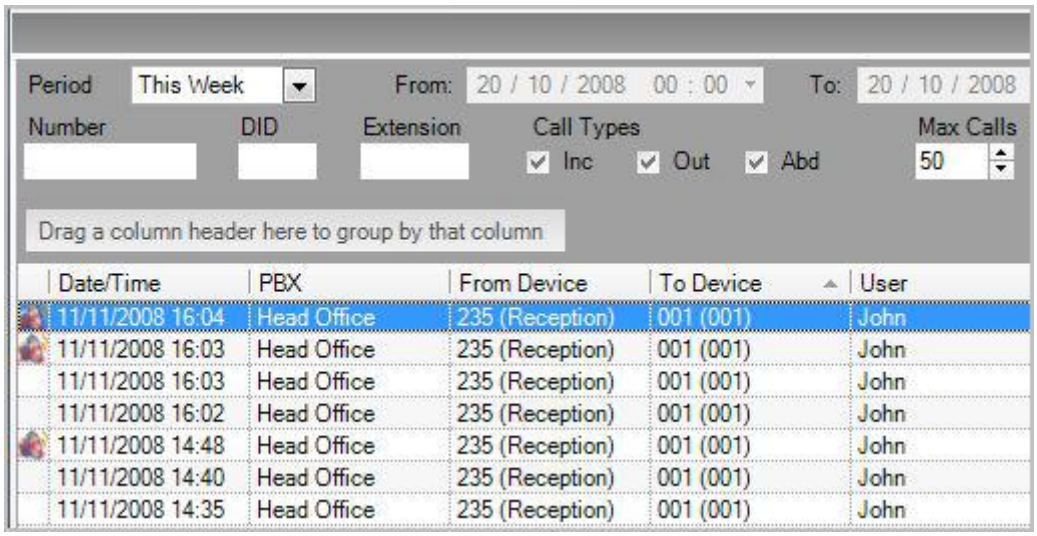


If you cannot see the quick search, click 'options' in the call records view and select 'Quick Search' from the options.

Having found the call or calls of interest you can add the call to the current playlist or create a new playlist by double clicking the speaker icon for that call. For more information on playlists see the playlist section.

Recordings which you cannot listen to

Calls that show a speaker icon crossed out means the calls has been excluded from call recording in the recording rules configuration.



Call Recording Configuration

Trunk Configuration

Configuration of call recording requires the correct configuration and licensing of trunks. Whilst this should be taken care of during the system installation, it is possible that the call recording configuration could change at some point due to licensing of additional trunks.

In order to enable recording on specific trunks they will need to be assigned as call recording trunks within the call recording configuration.

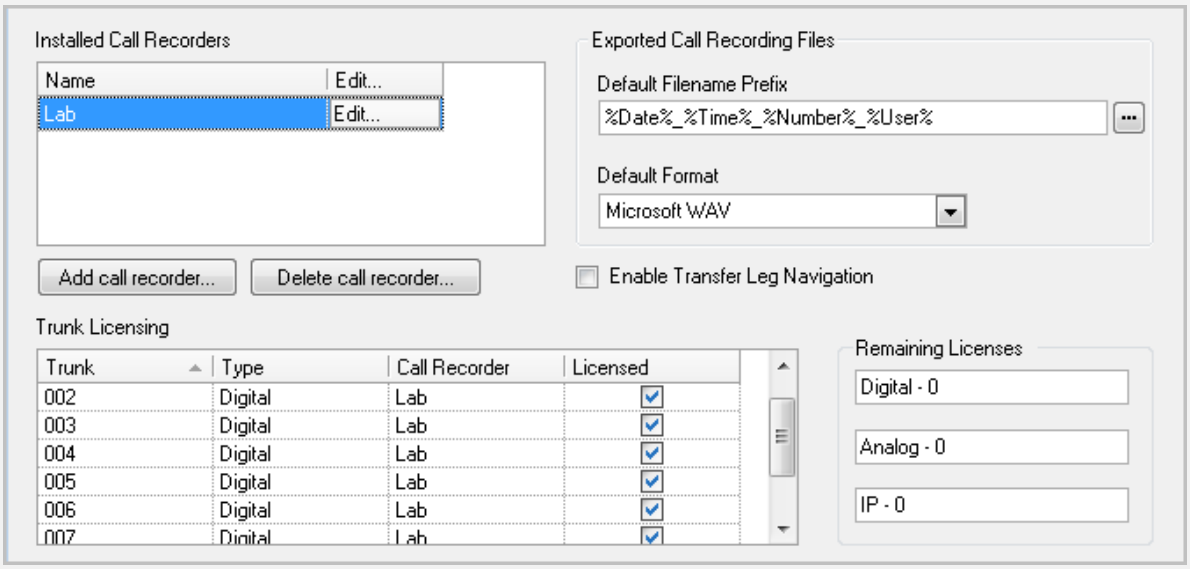
Access to the Call Recording configuration

How to: Access the Call-Recording configuration screen

1) From the menu select - Configure -> Telephone system -> PBX -> Call Recording

2) Select the 'Edit Call Recorder' Configuration

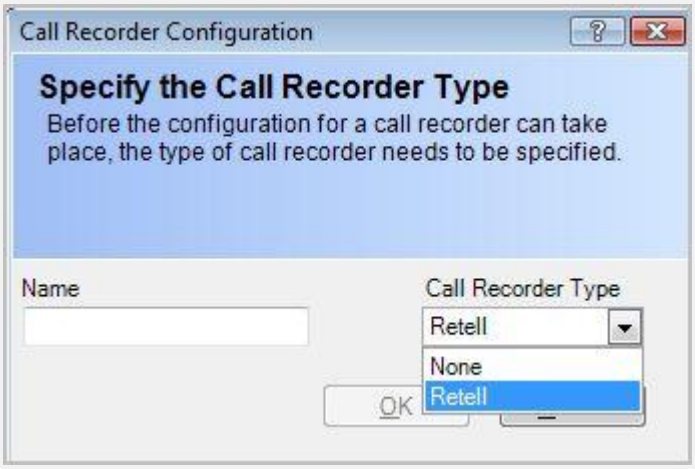
3) The Edit Call recorders window will be displayed



The Call recorder configuration screen allows the setting up of call recorder units, Licensing of Trunks and the editing of call recorder settings and recording rules.

How To: Add Call Recorders to the MyCalls Configuration

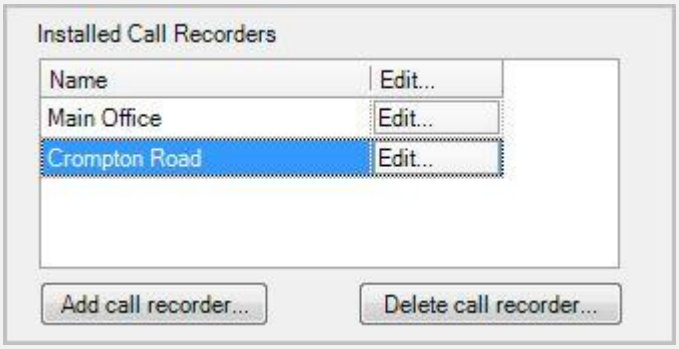
1) To add a new call recorder click the 'Add Call Recorder' button. The window below will appear.



2) Select the call recorder type from the drop down menu, and enter a name e.g. Crompton Road.

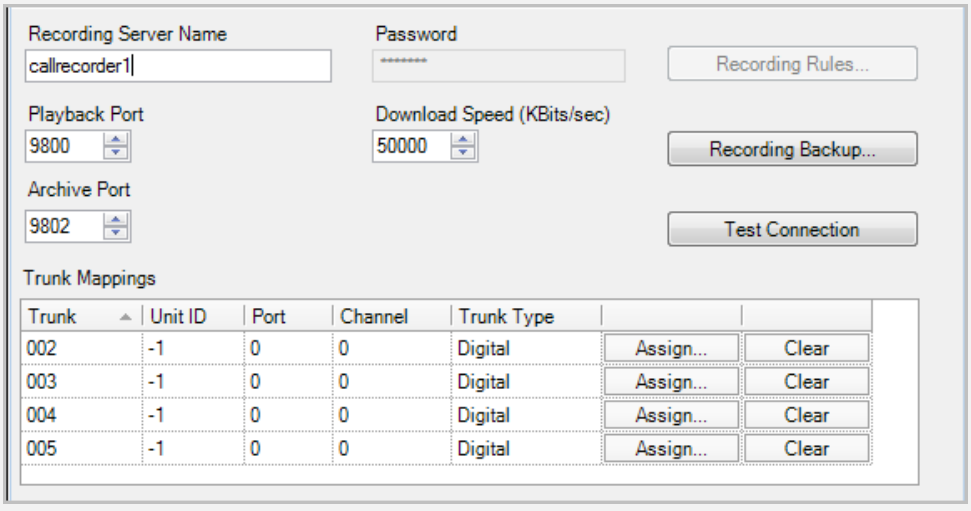
3) Click 'OK'

4) The call recorder will now appear in the 'Installed Call Recorders' section



5) Select the required call recorder and click 'Edit'

6) The Call recording configuration screen will be displayed

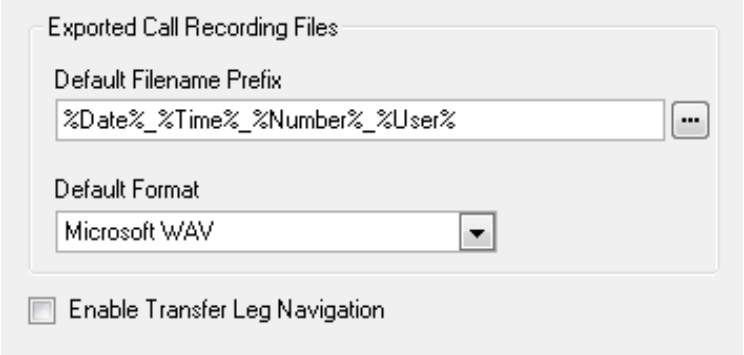


Recording Server Name: Enter the name of the call recording PC

Playback Port, Archive Port, Playback Speed: These do not normally require changing

Test Connection: Press this button to check the call recording PC is responding

Additional Configuration options

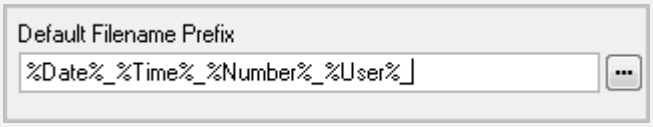


File export settings.

Default Filename Prefix: Defines the file naming for exported files. This can be freetext combined with pre defined identifier names. Any identifier name must be surrounded by % characters with no spaces. MyCalls will substitute an identifier with the appropriate value for example %user% will substitute the logged on user name, %Date% will insert the current Date etc.

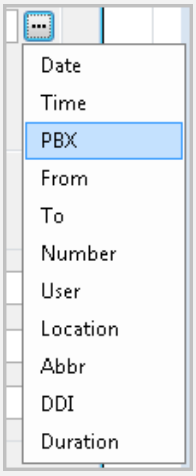
How To: Insert an identifier into the filename prefix

Set the cursor at the position in the prefix where you want to insert the identifier. In this example we have set the cursor at the end of the prefix.

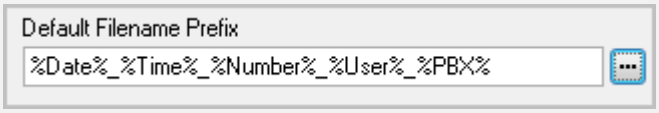


The available identifiers are available by clicking the button. This will display the list of identifiers.

Select the identifier and the new identifier will be added to the prefix.



The prefix will now be pre-pended to the filename whenever a call recording file is exported.



Enable Transfer Leg Navigation

This option enables the ability to display the identification of transfer legs in the waveform window.

Trunk Licensing

Whilst trunk licensing is an installation operation, it may be necessary for a system administrator to adjust or configure additional channels of call recording.

The call recorder is licensed to record a certain number and type of channels based on what the customer has bought. In order to know which of the channels are to be used, the trunks in MyCalls need to be set to the correct type and marked for inclusion in call recording.

Only trunks that are marked as ISDN or AN4009 are listed. Trunks that are either BRI or PRI need to be marked as **ISDN** within MyCalls

Trunks that are analogue need to be marked as **Analogue** within MyCalls

Remaining licenses for each type of trunk are indicated to the right of the Trunk Licensing grid.

Licensed trunks need to be associated with the appropriate call recorder. If only one call recorder is installed then selecting a licensed trunk checkbox will automatically select the call recorder. If there are more than one call recoder then you will need to select the call recorder for each trunk.

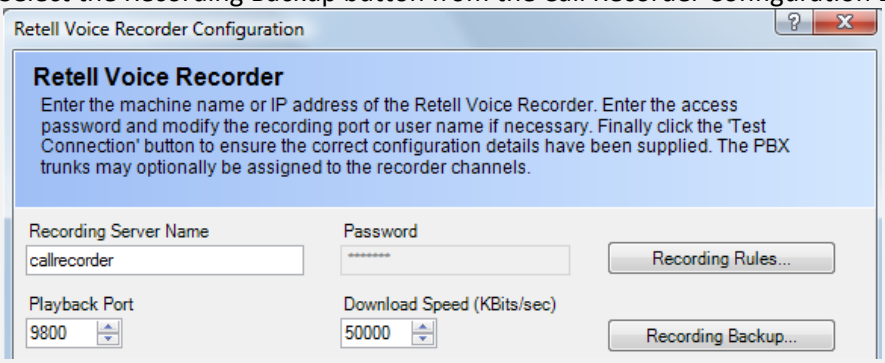
Backup Call Recordings

Call recordings can and should be backed up to an area that can be taken off-site for security purposes. The call recordings when backed up are still encrypted and can only be played using the MyCalls system. The backup can be scheduled to occur at set times and split into different volume sizes for storage on to CD or DVD. The split volumes create a new directory for each split and increment a number at the end of the volume name to ensure they are unique.

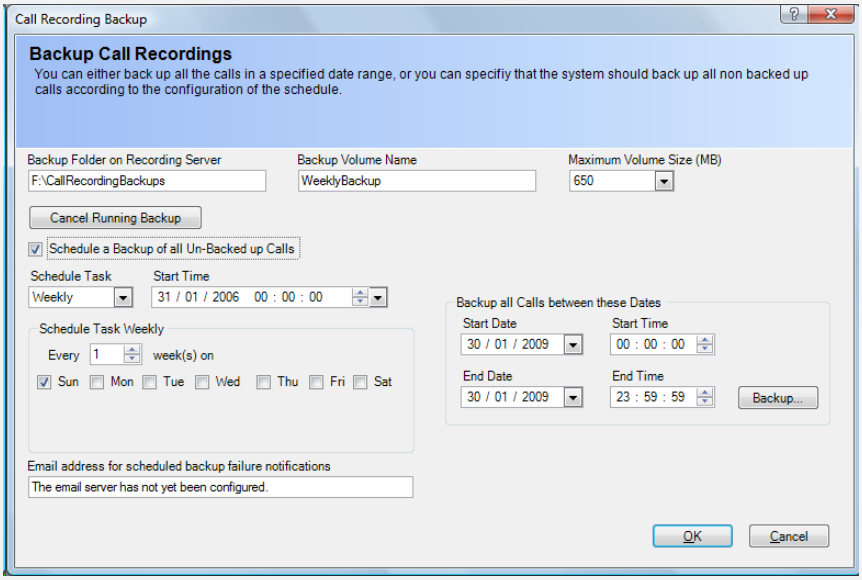
Once call recordings have been archived the system can remove the actual recording from the computer. If you wish to play back a call recording that has been archived and deleted from the system you will be instructed to insert the disk that hold the archived call recording. The system will then restore that call recording and can then be replayed.

How To: Configure Call Recording Backups

1) Select the Recording Backup button from the Call Recorder Configuration Dialog.


Retell Voice Recorder Configuration
Retell Voice Recorder
Enter the machine name or IP address of the Retell Voice Recorder. Enter the access password and modify the recording port or user name if necessary. Finally click the 'Test Connection' button to ensure the correct configuration details have been supplied. The PBX trunks may optionally be assigned to the recorder channels.
Recording Server Name
callrecorder
Password
Recording Rules...
Playback Port
9800
Download Speed (KBits/sec)
50000
Recording Backup...

2)


Call Recording Backup
Backup Call Recordings
You can either back up all the calls in a specified date range, or you can specifiy that the system should back up all non backed up calls according to the configuration of the schedule.
Backup Folder on Recording Server
F:\CallRecordingBackups
Backup Volume Name
WeeklyBackup
Maximum Volume Size (MB)
650
Cancel Running Backup
Schedule a Backup of all Un-Backed up Calls
Schedule Task
Weekly
Start Time
31 / 01 / 2006 00 : 00 : 00
Schedule Task Weekly
Every 1 week(s) on
Sun Mon Tue Wed Thu Fri Sat
Backup all Calls between these Dates
Start Date
30 / 01 / 2009
Start Time
00 : 00 : 00
End Date
30 / 01 / 2009
End Time
23 : 59 : 59
Backup...
Email address for scheduled backup failure notifications
The email server has not yet been configured.
OK
Cancel

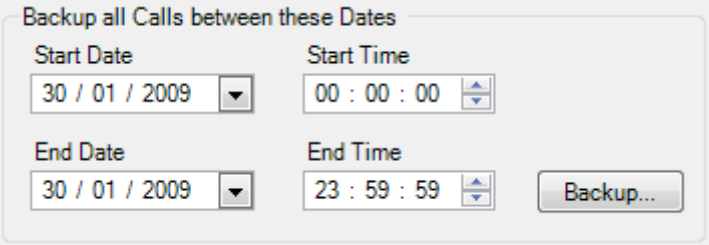
3)

4) The backup folder MUST be one that is local (attached) to the call recording server.

How To: Manually Start a Call Recording Backup

1) Select the Recording Backup button from Configure Call Recording Backup Dialog.

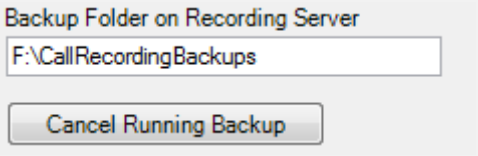
2) Enter the dates for the backup to apply to and press the Backup button.



3)

How To: Cancel a Running Call Recording Backup

1) Select the Recording Backup button from the Configure Call Recording Backup Dialog.

2) 

3) Press the Cancel Running Backup, This will instruct the call recording server to cancel any scheduled or manually started backups that are currently running.

Chapter 8

Telephone System Configuration

Configuration options

Before you can use MyCalls you will need to configure the application. To do so you will need to gather, at a minimum, the following information about your telephone system:

Trunks: The type and number of trunks connected to the PBX switches that MyCalls will be monitoring. For example are your trunks ISDN (BRI or PRI), analogue, mobile gateway etc.

Extensions: An itemized list of extensions along with their groupings either by location or business function. Ideally identify who is the regular user for each extension (Default User)

DID Numbers: If your organization uses DID numbers, you will need a list of them and their function or the name of the person who will be receiving calls to that DID. In most cases it is better to specify a business function to a DID e.g. Sales enquiries, Support etc.

If you are planning to configure organizational information such as users and user-groups then you will also need to gather information about who will be using the telephone system and how their roles are organized.

Quick tip:

Managing devices properly

Setting up devices properly can sometimes prove difficult especially if you have a large configuration to deal with. Some tips for finding and managing devices and groups are:

Look for devices in their System groups as well as their logical groups. If you know a device is a specific type then look in the system group for that type.

Make your groups as small as possible so making individual devices easier to locate

Name your groups so they make sense to you and your users

Only enable statistics for devices if you really need to as it impacts on system performance

Regularly check for unassigned devices and remove them from the configuration if possible

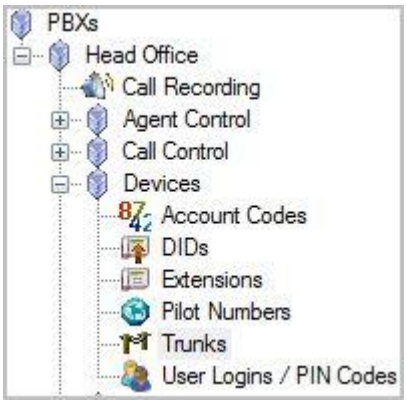
Use device import as the preferred method of configuring your devices and users

Accessing configuration options using the menu

Using the MyCalls menu you can access the configuration screens using:

Configure -> Telephone Systems -> PBXs

To configure Devices, Call Recording Groups, call control or Agent Control, Double click the PBX (in most cases there will be only one).



Configuration Essentials

Accessing configuration options using toolbar shortcuts

On the MyCalls toolbar Click on the Icon

What to Configure

Essential features

In order to configure MyCalls you must be logged on as a PBX Administrator (for more details on user privileges see the section on Organisation and Users).

The MyCalls Configuration menu provides the following configuration selections:

Telephone System: Configure details for your PBX switches, Telephone extensions, Trunks, DID's Account codes, Pilot numbers, ACD User Logins, PIN codes, call recording agent and call control.

Organisation: Configure the users and departments within your organization and set user privileges.

Callers: Define people who call you, or conversely people who you call on a regular basis. Identify callers according to organization or purpose of call e.g. business or personal callers and create your own caller groups so you can monitor how much time is spent dealing with various organizations.

Costs: Configure a wide range of call costing parameters to allow you to track the costs incurred, specify least cost routing and deal with multiple carriers for your call routing.

Alarms: Manage your business effectively by configuring alarms to alert you when an exception condition occurs. You can generate reports to show where and when these alarm conditions have occurred. You can monitor call rates, performance, emergency calls, disallowed calls etc and assign these to; groups, devices and users. Alarms can be flashed up on the screen and distributed via email.

System Settings: Allow setting up of an email and FTP server for distribution of alarms and reports.

Operational settings: Grace periods allow you to ignore invalid ring times or call lengths and can be configured differently for each Group of devices. Grade of service settings allow you to specify when a call has lasted too long or when the ring time was too long.

Minimum Configuration

At the minimum you will need to configure:

Trunks: Carry all calls to and from your organization and are the key mechanism employed by the application when recognizing calls.

Extensions: These represent the physical telephones available in your organization. Extensions come in a wide variety of types ranging from traditional, analogue phones, digital phones, VoIP phones etc.

DID's: If you use DID numbers within your organization you will need to configure them so that MyCalls is able identify and group calls to each DID or DID group.

Call recording: If you are using call recording then you will need to configure your call recording settings before you can match your calls against their recordings.

.

Optional features

Alarms: You will need to configure the alarm conditions relevant to your organization dependent on what you want to monitor

Agent Control, Call control, Account Codes, Callers and Costing are also features that you may wish to configure once you have set up the basic system and properly configured and checked the essential items.

Automatic Device Configuration

MyCalls will automatically configure devices as they become visible on the system. If a call appears on an extension then that extension will be added to the list of devices if:

- The device does not currently exist
- The device has not been manually deleted from the list.

The devices which can be automatically configured are:

Extensions, DIDs, Account Codes, Trunks, Pilot numbers.

Following an install of the system it may be advisable to allow a period of several hours whilst the system auto-configures the most regularly used devices. You can regularly check for devices which have been auto-configured by running the system report – 'Auto Configured Devices'. However, don't rely on Auto-Configuration, create them upfront if possible.

Quick tip:

Automatic configuration of devices

MyCalls will automatically add new devices to its list of configured items if they appear as a result of a call. These devices will be added to the appropriate list of devices if the particular value does not already appear in the list. For example any extension numbers which appear as a result of calls will be added to the extensions list.

If you delete a particular instance of a device from the list then it will not be added to the list in future.

This applies to all devices but the information for that device must also be available from the PBX switch. For further details on which features are supported by your PBX switch please contact your switch maintainer.

All devices added due to auto-configuration will have the type of 'unassigned' and a created user of 'auto configuration'

General Configuration Tasks for devices

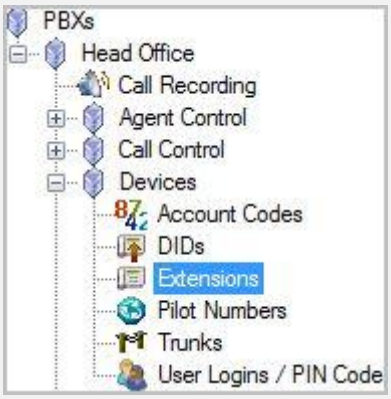
Configuration of devices follows a similar set of operations for each type of device:

- Decide on what devices you are going to configure
- Arrange you devices into functional groups to allow more meaningful reporting or screen displays
- Create the device groups
- Create the devices
- Assign an identifier to the device e.g. extension number or DID number, specify device specific information, assign users to the device and configure all device options.
- Assign the devices to their respective groups.

Ranges of items

How To: Creating an item or range of items

1) From the device configuration window e.g. Configure -> Telephone systems ->Devices ->Extensions select the 'Create a range of' option



2) Select the number of devices to create
3) Enter the start value for the device number e.g. create 100 extensions starting at 201 will create extensions 201 to 301

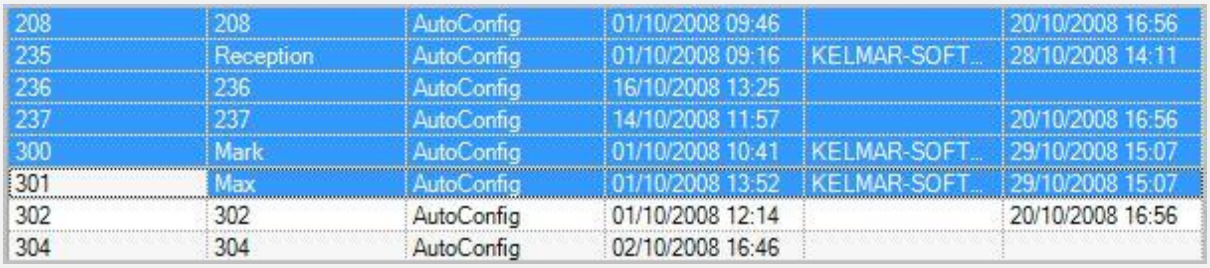
Optional steps

4) Assign a type to the device e.g. Digital Desk Phone
5) Assign the devices to a group
6) Add any relevant notes
7) Click 'OK'

Deleting an item or range of items

How To: Deleting an item of a range of items

1) Deleting an item or a range of items requires the same process for Extensions, Trunks, DIDs, Account Codes, and Pilot Numbers. The steps below will describe the deletion process with the example of extensions.
2) From the MyCalls Telephone System Configuration screen, click 'Extensions'
3) Click 'Delete a Range of Extensions'
4) In the dialogue box that appears, select the extensions you wish to delete in the extension list. You can select multiple extensions by holding down the control key (ctrl) as you click on the rows.



208	208	AutoConfig	01/10/2008 09:46		20/10/2008 16:56
235	Reception	AutoConfig	01/10/2008 09:16	KELMAR-SOFT...	28/10/2008 14:11
236	236	AutoConfig	16/10/2008 13:25		
237	237	AutoConfig	14/10/2008 11:57		20/10/2008 16:56
300	Mark	AutoConfig	01/10/2008 10:41	KELMAR-SOFT...	29/10/2008 15:07
301	Max	AutoConfig	01/10/2008 13:52	KELMAR-SOFT...	29/10/2008 15:07
302	302	AutoConfig	01/10/2008 12:14		20/10/2008 16:56
304	304	AutoConfig	02/10/2008 16:46		

5) Click 'OK' to complete the deletion process. Be aware that you will not be prompted to confirm this process once you press the OK button so please make sure you have the right codes highlighted before pressing OK to continue.

PBX Configuration

Single PBX configurations

PBX Configuration takes place during the system installation. The Application has been set up to recognise the PBX which controls your telephone system. MyCalls links to the PBX and records the telephone call data and for most installations there will probably be one PBX.

How To: Alter the PBX configuration

1) Select the PBX from the telephone system configuration. Configure->Telephone System -> PBXs ->head office

2) Click 'Edit PBX Configuration'

3) You are presented with a dialog panel which allows the editing of various parameters (not all these parameters can be changed).

4) **PBX Code:** (read only) Displays the PBX Code (name) assigned to the PBX.

5) **Area Code**: your local area code allows MyCalls to recognize local calls.

6) **International Code**: Enter your international code

7) **Country** (read only)

8) **Edit Country numbering plan** – (see next section)

9) **Admin User**: Allows you to set a default admin user for the PBX as follows

10) Click 'Select' – Select User dialog appears.

11) Type the initial of the user you wish to set as the admin user

12) Select the user from the list and click 'select'

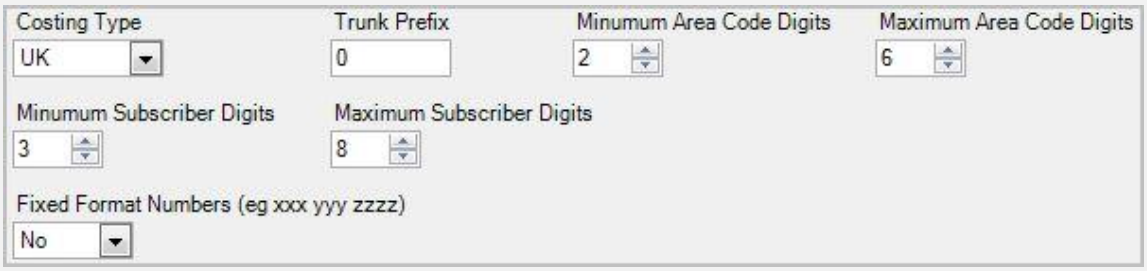
13) Click 'OK'

14) Setting an Admin user creates a default email address to which various admin level reports such as audit logs will be automatically sent.

Country Numbering Plans

How To: Creating Country Numbering Plans

1) To cater for numbering systems in different countries, MyCalls allows the entry of various parts constituting a telephone number.



2) **Costing Type**: defines the country costing schema used for this PBX
3) **Trunk Prefix**: First digit of a non local number
4) The minimum and maximum number of area code digits
5) Minimum and maximum number of subscriber digits
6) Specify whether the numbers are fixed format i.e. the same number of digits for all numbers
7) Click 'OK'

Device Configuration

Types of devices

Devices configurable within MyCalls are as follows:

- Trunks
- Extensions
- DIDs – Direct Inbound Dial numbers
- Account codes
- User Logins/Pin Codes
- Pilot Numbers

Trunks

Trunks (Lines) are devices that connect the PBX to other switching devices such as the PSTN or another PBX. Trunks come in various types ISDN, Analogue, TCP-IP or Q-SIG depending on what the PBX is connecting to.

Organising and Naming Trunks

We need to define trunks for the following reasons:

- We can report on trunk usage.
- Analyzing overall performance of our telephone system helps us to identify weaknesses in the system at the physical level e.g. have we enough trunks.

- We can view the overall call statistics of our entire telephone system
- Required to configure Call recording which is licensed on a trunk by trunk basis
- Helpful when Identifying faults on your telephone system if, for example, a trunk is showing abnormally low usage

Assigning and grouping Trunks

Generally the MyCalls installer would create the trunk configuration as they would know the types of trunks available in the telephone system. It is important that the trunks are assigned correctly as this will allow you to correctly configure your statistics windows and reports. In addition your call recording configuration is assigned to record on specific trunks.

For Example; You have a 30 trunk PRI connection, a 2 trunk BRI connection linked to a GSM gateway for mobile calls and 2 Analogue lines linked to the company fax machines.

You could create several groups as follows

- BRI group – contains all BRI trunks
- PRI group – contains all PRI trunks
- Faxes group – contains all analogue fax lines

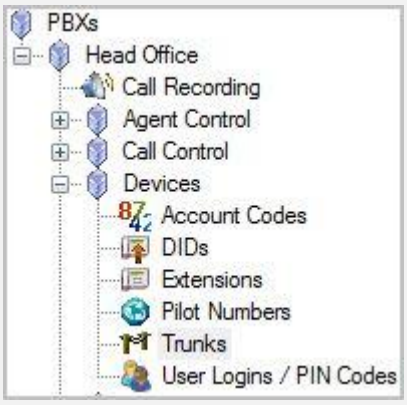
With this configuration you could report on usage in the following ways

- Overall calls in and out on all trunks
- Call statistics for the PRI trunks (main telephone traffic) only
- Call statistics for GSM gateway (mobile) calls
- Detect any mobile calls being routed via the PRI trunks
- View real time call data for each group of trunks

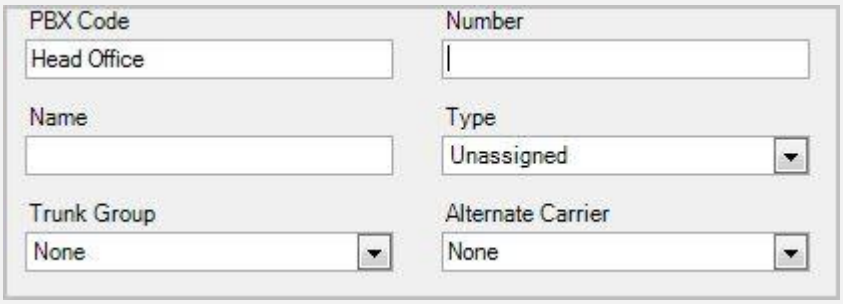
Creating and editing Trunks

How To: Creating a single Trunk

1) From the MyCalls Telephone System Configuration screen, click 'Trunks'



2) Click 'Create or Edit a Trunk' in the Trunk configuration area. The Edit Trunk screen appears.
3) Click 'Add New Trunk'.
4) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.

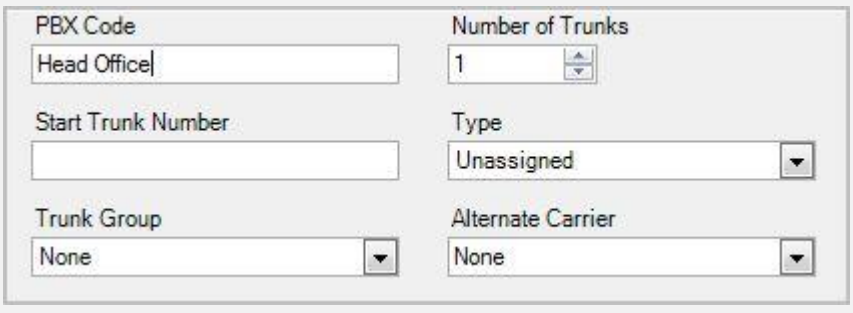


5) **Number*:** Enter here the trunk number you wish to create. This must be a valid trunk configured on your telephone system.
6) **Name*:** Enter a name for your trunk to identify its use. If left blank the system will populate this field with the number
7) **Trunk Group:** You can select a trunk group to group this trunk number under. The values in this list are configurable under Trunk Groups. The default value is set as none.
8) **Type:** Select a trunk type from the drop down menu
9) **Alternate Carrier:** An alternate carrier can be assigned to a trunk. This means that calls made on this trunk can have different costings applied to the standard one.
10) Click 'OK'

Creating a range of Trunks

How To: Creating a range of Trunks

1) From the MyCalls Telephone System Configuration screen, click 'Trunks'
2) Click 'Create a Range Trunks' in the Trunk Configuration area.
3) In the dialogue window that appears, a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs.



4) **Number of trunks*:** Enter the number of trunks you wish to create in the range.
5) **Start Trunk Number*:** Enter the number to start your trunk range from here.
6) **Trunk Group:** Select the trunk type from the drop down menu
7) **Alternate Carrier:** Assign an alternate carrier to the trunk range. This means that calls made on this trunk can have different costings applied.
8) Click 'OK'

A block of trunks will now have been inserted into the Configured Trunks list box. You should configure these trunks with appropriate name and options using procedures described later in this topic before clicking the 'OK' button to complete your trunk creation process. Note that the trunks you create should correspond to those configured in the telephone system.

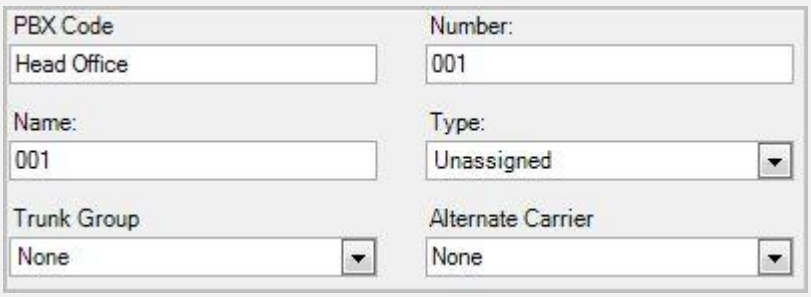
Editing existing Trunks

How To: Editing existing Trunks

1) From the MyCalls Telephone System Configuration screen, click 'Trunks'.
2) Click 'Create or Edit a Trunk' in the Trunk configuration area. The Edit trunk screen appears.

001	001	Unassigned	None	Edit...
002	002	Unassigned	None	Edit...
005	005	Unassigned	None	Edit...

3) In the dialog box that appears click the 'Edit...' button to the right of the trunk you want to edit.
4) In the second dialog box that appears, configure a Name for the trunk and if required, select a trunk Group, trunk Type and assign an alternate carrier.



5) Click 'OK'
6) Repeat these stages for as many trunks as you need to configure.
7) Click 'OK' to save all the changes you have made.

Extensions

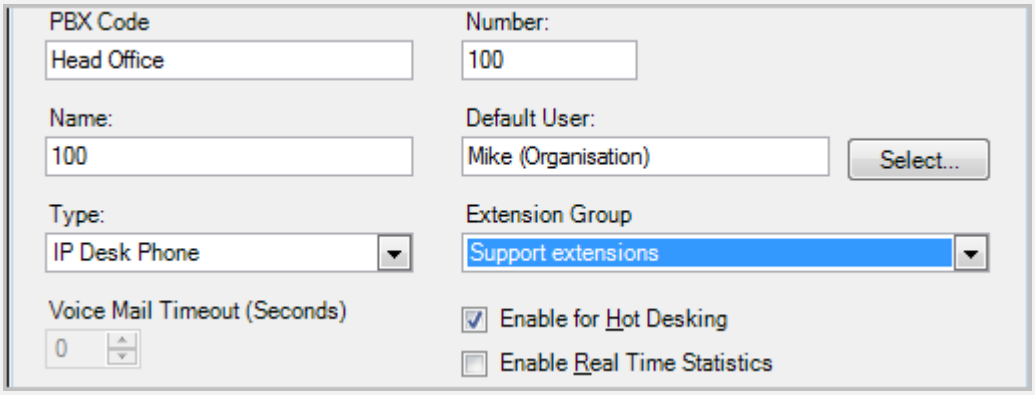
An extension (station) is setup to be a pre-defined type. A user extension would be typically setup as a desk phone, cordless phone or cellular phone type. A system installer also uses extensions to configure devices such as auto-attendants, voice mail ports, and announcement ports.

Organising and Naming Extensions

Creating and Editing Extensions

How To: Creating a single Extension

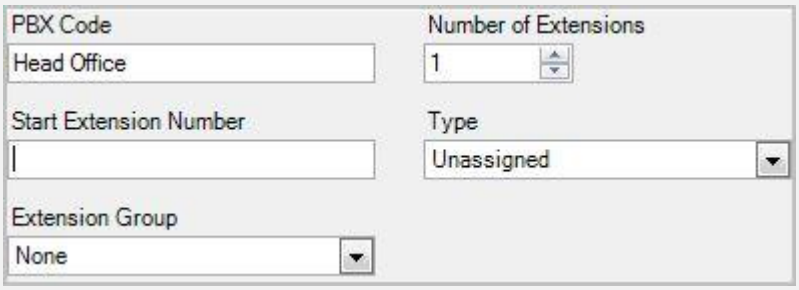
1) From the MyCalls Telephone System Configuration screen Click on 'Extensions'
2) Click 'Create or edit an extension'. The edit Extensions screen appears.
3) Click 'Add new extension'
4) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



5) **Number*:** Enter the number of the Extension you wish to create. This must be for a valid extension number configured on your telephone system.
6) **Name*:** Enter a name for your extension to identify its use. If left blank the system will populate this field with the Number.
7) **Extension Group:** You can select an extension group to group this device under. The values in this list are configurable under Extension Groups. The default value is set as None.
8) **Enable real time statistics:** This option should be enabled if you want call data collected from the telephone system for this extension to be included in the real time statistics. It is good practice for extensions not used to have this option disabled so as to minimize unnecessary processing.
9) **Enable for Hot Desking:** Makes the extension available for inclusion in list of available extensions when logging in to MyCalls
10) **Default User:** Specify a default user using the select button (See default user section). You can assign a default user to an extension to enhance reporting. A default user is someone who regularly uses the extension.
11) **Type:** Select the extension device type from the drop down menu.
12) **Voicemail Timeout:** If the Type field is set to either auto attendant, voice mail or announcement port then setting a voice mail timeout will cause any incoming calls to the extension connected for less than the voicemail timeout to be marked as abandoned.
13) Click 'OK'

How To: Creating a range of Extensions

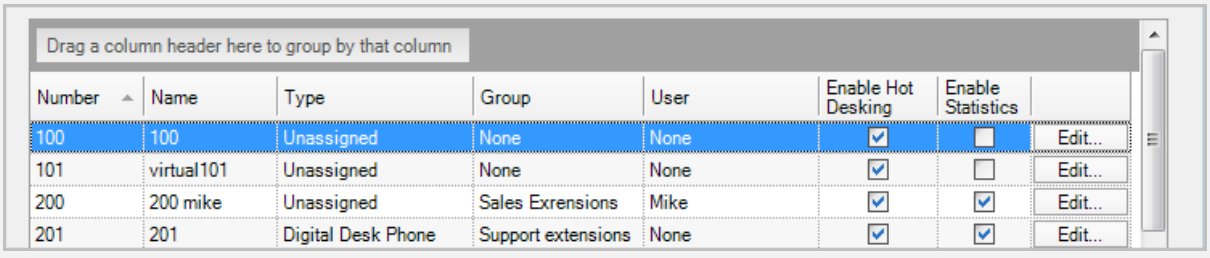
1) From the MyCalls Telephone System Configuration screen Click 'Extensions'
2) Click 'Create a range of extensions'.
3) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below:



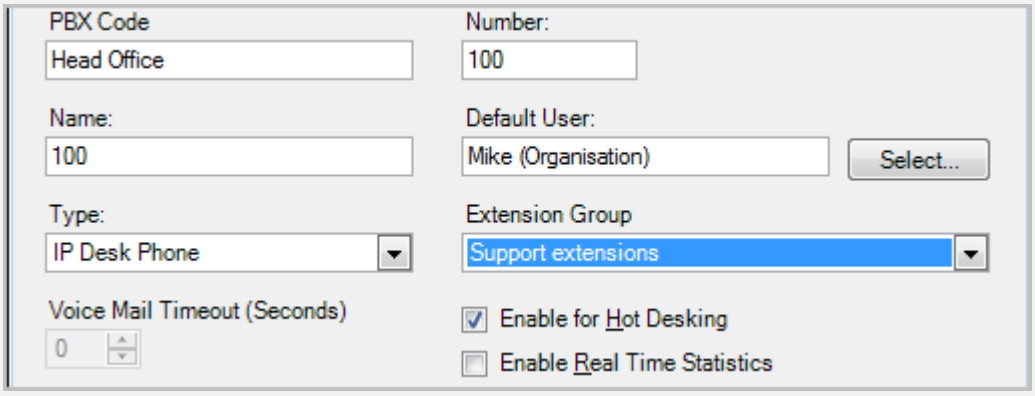
4) **Number of extensions*:** Enter here the number of extensions you wish to create in the range.
5) **Start Extension*:** Enter the number to start your extension range from here.
6) **Extension Group:** You can select an extension group to group this range under. The values in this list are configurable under extension Groups. The default value is None.
7) Click 'OK'

How To: Editing existing Extensions

1) From the MyCalls Telephone System Configuration screen, click 'Extensions'
2) Click 'Create or Edit an Extension' in the Extensions configuration area.
3) In the dialog box that appears click the 'Edit…' button to the right of the Extension you want to edit.


Drag a column header here to group by that column
Number
Name
Type
Group
User
Enable Hot Desking
Enable Statistics
100 100 Unassigned None None Edit...
101 virtual101 Unassigned None None Edit...
200 200 mike Unassigned Sales Exrensions Mike Edit...
201 201 Digital Desk Phone Support extensions None Edit...

4) In the second dialog box that appears, configure a Name for the Extension, and if required select an Extension Group and Extension Type.



5) Click 'OK'

6) Repeat these stages for as many Extensions as you need to configure

7) Alternatively, you can edit the rows without clicking 'edit'. Click in the name column and enter a name, click in type column and select a type from the drop down menu, and click in the group column and assign the person to a group. If you would like to enable statistics for a particular person, tick the box in the enable statistics column.

8) Click 'OK' to save all the changes you have made

DIDs

DIDs (Direct Inbound Dials) are numbers that customers dial to reach either an individual (personal DID) or a specific group. DIDs can be published to customers and reports can be generated to identify which DIDs are the most effective.

Creating and Editing DIDs

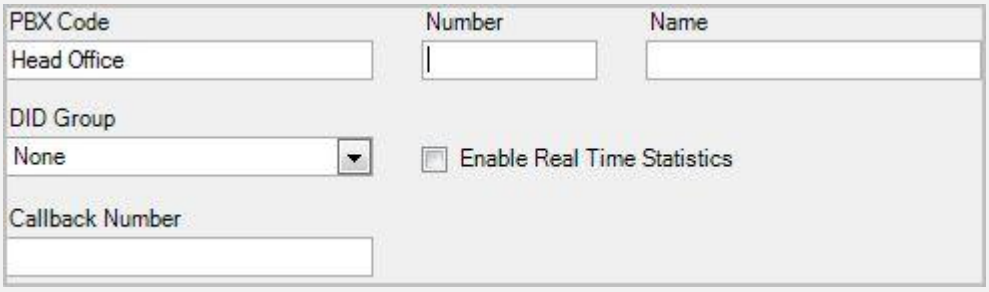
How To: Creating a single DID

1) From the MyCalls Telephone System Configuration screen, click 'DIDs'.

2) Click 'Create or Edit a DID' in the DID configuration area. The Edit DID screen appears.

3) Click the 'Add New DID' button.

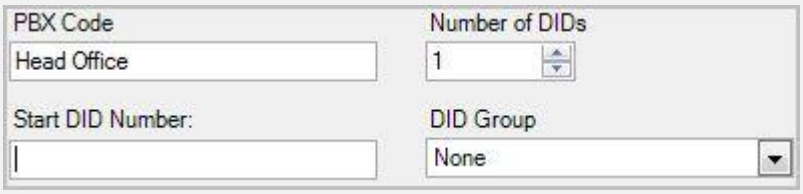
4) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



5) **Number***: Enter here the number of the DID you wish to create. This must be for a valid DID number configured on your telephone system
6) **Name***: Enter a name for the DID to identify its purpose. If left blank the system will populate this field with the Number.
7) **DID group**: You can select a DID group to group this number under. The values in this list are configurable under DID Groups. The default value is set as None.
8) **Enable real time statistics**: This option should be enabled if you want call data collected from the telephone system for this DID to be included in the real time statistics. It is good practice for DIDs not used to have this option disabled so as to minimize unnecessary processing.
9) Click 'OK'

How To: Creating a range of DIDs

1) From the MyCalls Telephone System Configuration screen, click 'DIDs'
2) Click 'Create a Range of DIDs' in the DID configuration area.
3) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs

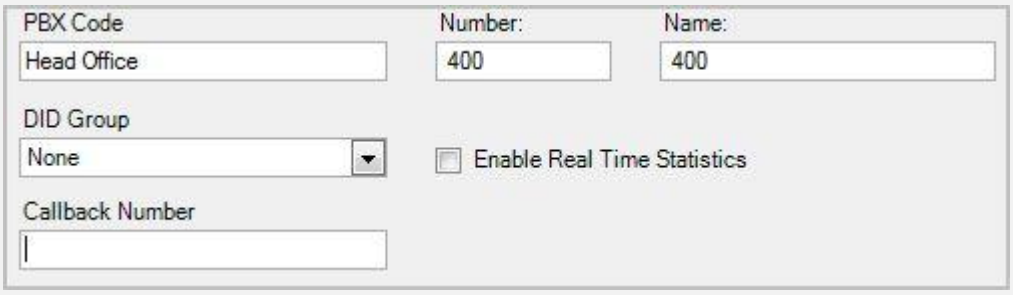


4) **Number of DIDs*:** Enter here the number of DIDs you wish to create in the range.
5) **Start DID*:** Enter the number to start your DID range from here. This must be the starting number for a valid DID range configured on your telephone system.
6) **DID group:** You can select a DID group to group this range under. The values in this list are configurable under DID Groups. The default value is None.
7) Click 'OK'

A block of DIDs will now have been inserted into the Configured DIDs list box. You should configure these DIDs with appropriate names and groups using procedures described later in this topic before clicking the 'OK' button to complete your DID creation process. Note that the DID numbers you create should correspond to those configured in the telephone system.

How To: Editing existing DIDs

1) From the MyCalls Telephone System Configuration screen, click 'DIDs'
2) Click 'Create or Edit a DID' in the DID configuration area. The Edit DID screen will appear.
3) In the dialog box that appears click the 'Edit…' button to the right of the DID you want to edit.
4) In the second dialogue box that appears, configure a Name for the DID and if required select a DID Group and enable or disable the real time statistics option for this DID.



5) Click 'OK'
6) Repeat these stages for as many DIDs as you need to configure
7) Click 'OK' to save changes

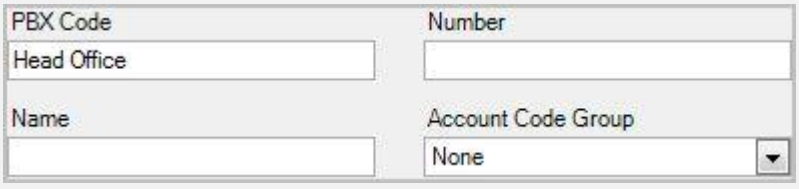
Account Codes

Account codes are numbers entered by the person answering the call and are usually assigned to a customer, a project, department, marketing campaign or any other business function. Reports can then be run against these account codes to identify the calls assigned to that particular code.

Create/Edit Account Codes

How To: Creating a single Account Code

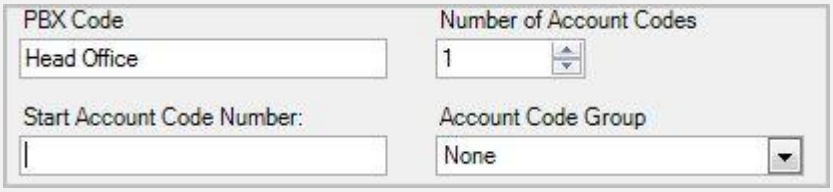
1) From the MyCalls Telephone System Configuration screen, click 'Account Codes'
2) Click 'Create or Edit an Account Code'. The Edit Account Codes screen appears.
3) Click 'Add New Account Code'.
4) In the dialogue window that appears, a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



5) **Number*:** Enter here the number of the account code you wish to create. This must be for a valid account code configured on your telephone system.
6) **Name*:** Enter a name for your account code to identify its purpose. If left blank the system will populate this field with the Number.
7) **Account Code Group:** You can select an account code group to group this code under. The values in this list are configurable under Account Code Groups. The default value is set to None.
8) Click 'OK'

How To: Creating a range of Account Codes

1) From the MyCalls Telephone System Configuration screen, click 'Account Codes'
2) Click 'Create a Range of Account Codes'
3) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs.

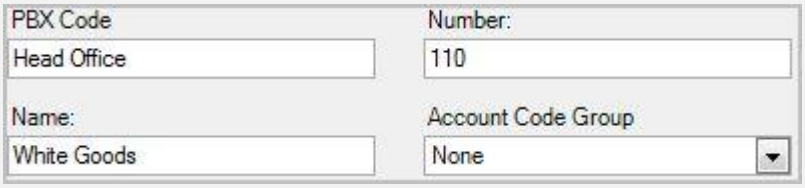


4) **Number of Account Codes*:** Enter here the number of account codes you wish to create in the range.
5) **Start Account Code Number*:** Enter the number to start your account code range from here. This must be the starting number for a valid account code range configured on your telephone system.
6) **Account Code Group:** You can select an account code group to group this range under. The values in this list are configurable under Account Code Groups. The default value is set to None.
7) Click 'OK'

A block of account codes will now have been inserted into the Configured Account Codes list box. You should configure these account codes with appropriate names and groups using procedures described later in this topic before clicking the 'OK' button to complete your account code creation process. Note that the account code numbers you create should correspond to those configured in the telephone system.

How To: Editing existing Account Codes

1) From the MyCalls Telephone System Configuration screen, click 'Account Codes'
2) Click 'Create or Edit an Account Code' in the Account Codes configuration area.
3) In the dialogue box that appears click the 'Edit…' button to the right of the account code you want to edit.
4) In the second dialog box that appears, configure a Name for the account code and if required select an Account Code Group.



5) Click 'OK'
6) Repeat these stages for as many account codes as you need to configure
7) Click 'OK' to save all the changes you have made

Configuring ACD environment devices

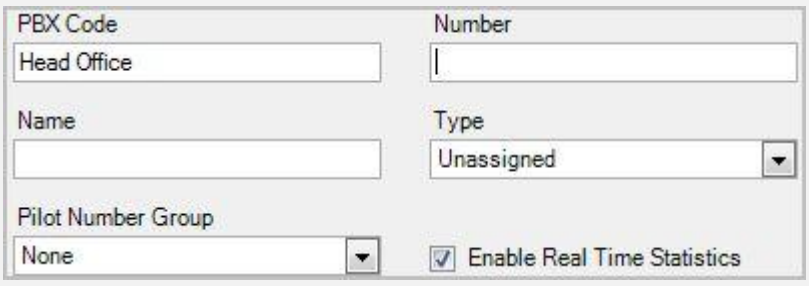
Pilot Numbers

Pilot Numbers are the numbers that are dialled to reach either an ACD queue or a hunt group. These are usually internal numbers to the PBX and calls to these pilot numbers are usually transferred from an auto-attendant or a DID.

Creating and Editing Pilot Numbers

How To: Creating a single Pilot Number

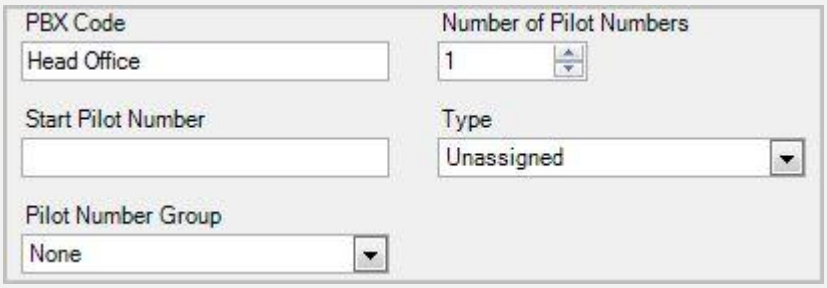
1) From the MyCalls Telephone System Configuration screen, click 'Pilot Numbers'
2) Click 'Create or Edit a Pilot Number' in the Pilot Number configuration area. The Edit Pilot Numbers screen appears.
3) Click 'Add New Pilot Number'
4) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



5) **Number*:** Enter here the number of the pilot number you wish to create. This must be a valid pilot number configured on your telephone system.
6) **Name*:** Enter a name for your pilot number to identify its use. If left blank the system will populate this field with the Number.
7) **Pilot Number Group:** You can select a pilot number group to group this pilot number under. The values in this list are configurable under Pilot Number Groups. The default value is set as None.
8) **Type:** Assign the pilot number as either of type ACD Queue or Hunt Group.
9) **Enable Real Time Statistics:** This option should be enabled if you want call data collected from the telephone system for this pilot number to be included in the real time statistics. It is good practice for pilot numbers not used to have this option disabled so as to minimize unnecessary processing.
10) Click 'OK'

How To: Creating a range of Pilot Numbers

1) From the MyCalls Telephone System Configuration screen, click 'Pilot Numbers'
2) Click 'Create a Range of Pilot Numbers' in the Pilot Number configuration area.
3) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs.

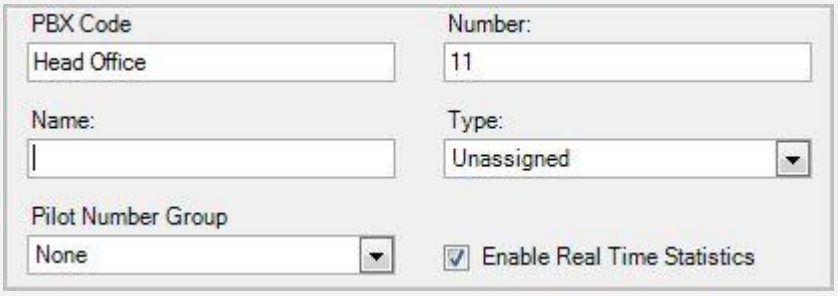


4) **Number of Pilot Numbers*:** Enter here the number of pilot numbers you wish to create in the range
5) **Start Pilot Number*:** Enter the number to start your pilot number range from here.
6) **Pilot Number Group:** You can select a pilot number group to group this range under. The values in this list are configurable under pilot number Groups. The default value is None.
7) Click 'OK'

A block of pilot numbers will now have been inserted into the 'Configured Pilot Numbers' list box. You should configure these pilot numbers with appropriate name, pilot number types and groups using procedures described later in this topic before clicking the 'OK' button to complete your pilot number creation process. Note that the pilot numbers you create should correspond to those configured in the telephone system.

How To: Editing existing Pilot Numbers

1) From the MyCalls Telephone System Configuration screen, click 'Pilot Numbers'
2) Click 'Create or Edit a Pilot Number' in the Pilot Number configuration area.
3) In the dialog box that appears click the 'Edit…' button to the right of the pilot number you want to edit.
4) In the second dialog box that appears, configure a Name for the pilot number and if required select a Pilot Number Group, Pilot Number Type and enable or disable the real time statistics option for this extension.



5) Click 'OK'
6) Repeat these stages for as many pilot numbers as you need to configure
7) Click 'OK'

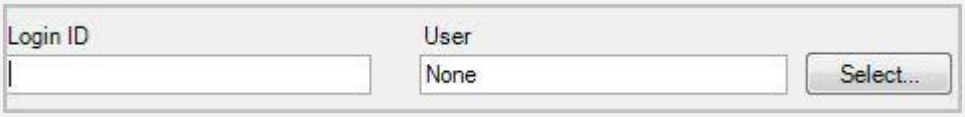
User logins and Pin Codes

User Logins are the codes that users enter into their telephone handset to start receiving calls in an ACD environment. They are sometimes referred to as PIN codes. This is the way that the system recognises that someone is at the extension and ready to take calls. Calls are then assigned to the logged in user rather than the default user. This can be called 'hot desking', where a person can change desks and still receive their calls.

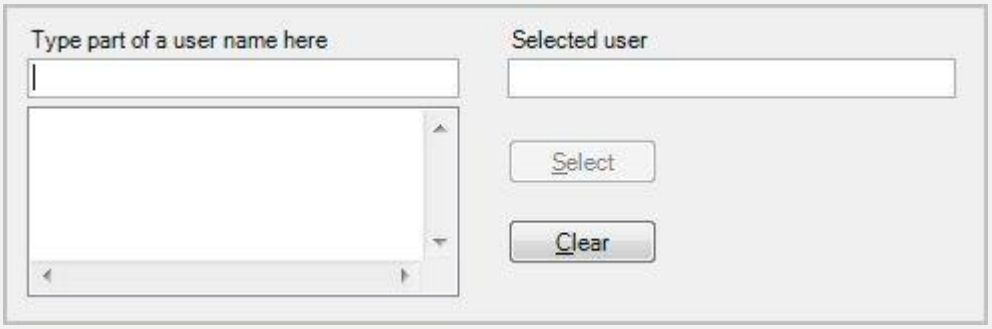
Create/ Edit User logins and Pin Codes

How To: Creating a single new User Login

1) From the MyCalls Telephone System Configuration screen, click 'User Logins/ Pin Codes'
2) Click 'Create or Edit a User Login' in the User Login configuration area. The Edit User Login screen appears.
3) Click 'Add New User'
4) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



5) **Login ID:** Enter here the User Login ID entered at an extension by the user.
6) **User*:** Assign a user to a User Login ID to enhance reporting so you can run reports on the user no matter what extension they are logged in at. To select a user click the 'Select…' button to the right of the user field. The Select User screen will appear.



7) You can search for a user using the left field. As you type in a name, relevant matches will appear in the box below. Once you have found your user, select them in this box and click the 'Select' button. They will appear in the 'Selected User' field. If you wish to remove a selected user then Press the 'Clear' button. When finished press 'OK' to complete your selection.
8) Click 'OK'

How To: Creating a range of User Logins

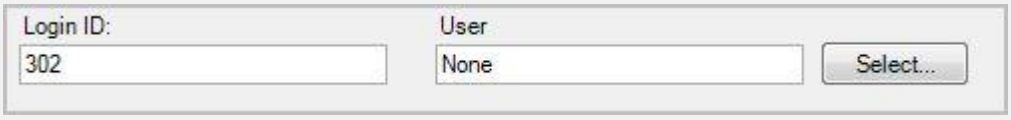
1) From the MyCalls Telephone System Configuration screen, click 'User Logins/ Pin Codes'
2) Click 'Create a Range of User Logins' in the User Login configuration area.
3) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs.

4) **Number of Logins*:** Enter here the number of User Logins you wish to create in the range. You can use the arrow buttons to the right of the field to either increment or decrement the value using your mouse or enter the value using the keyboard.
5) **Start Login Number*:** Enter the number to start your User Login ID number range from here.
6) Click 'OK'.

A block of user logins will have now been inserted into the Configured User Logins list box. You should configure these user logins with appropriate name and options using procedures described later in this topic before clicking the OK button to complete your user login creation process. Note that the user logins you create should correspond to those configured in the telephone system.

How To: Editing existing User Logins

1) From the MyCalls Telephone System Configuration screen, click 'User Logins/Pin Codes'
2) Click 'Create or Edit a User' Login in the User Login configuration area.
3) In the dialog box that appears click the 'Edit...' button to the right of the user login you want to edit.
4) In the second dialog box that appears, configure a Login ID for the user login and if required select a User to associate with this ID.



5) Click 'OK'
6) Repeat stages 2 to 5 for as many user logins as you need to configure
7) Click the 'OK' to save all the changes you have made.

Group configuration

Grouping devices allows you to monitor and report on overall performance of areas of your business rather than individuals. You can also analyse individuals within a given group and ignore other devices or compare one group against another.

The first step in creating a group of devices requires you to gather information regarding groups of devices such as extensions or DIDs. Once you have done this, creating a group of devices is straightforward.

Creating and organising your groups is similar regardless of the device type being grouped

You can create and populate groups of any device type and name that group according to function e.g. Sales, or to location, e.g. Dave's office or to indicate a device type e.g. BRI trunk 1. Some devices have some predefined groups namely Extensions (Analogue, Digital Desk etc); Pilot numbers (ACD queues, Hunt Groups) and Trunks. Having predefined groups for these devices is a convenience but normally you will expect to create your own user defined groups

A device can only be in one user defined group but will be a member of several system groups.

System groups

A system group is a group of devices defined by their type rather than being assigned to a specific user defined group.

Extension type - groups		
Analogue phone	All phones of an analogue nature	Analogue user phone Analogue system phones
Announcement port	Extensions used to play messages	Announcement port
Auto attendant	Automatically answer calls	Auto Attendant
Cordless phones	Not fixed in a specific location	Cordless phones
Desk Phones	Phones fixed to a desk	Analogue Desk phone Digital Desk phone IP Desk phone
Digital Phones	Phones of a digital nature	Digital Desk phones IP Desk phones
All Extension types	Any extension	
All non PBX phones	Cellular phones, land lines or pagers where a bill can be imported	
All system phones	All extensions that cannot be answered by a user	Announcement ports, auto attendant, voicemail
All user PBX phones	All extensions a user can answer i.e. it excludes system phones	
All user phones	All extensions a user can answer including non PBX phones	
All Voicemail ports	All extensions which record messages left by callers	
Pilot Number groups		

Hunt Group	All pilot numbers assigned as hunt group type
ACD Group	All pilot numbers defined as ACD queue type
All Pilot numbers	
Trunk Groups	
All Analogue trunks	All trunks connected as analogue lines
All ISDN trunks	All trunks of type ISDN
All private wires	Trunks used to connect PBXs together
All Q-Sig	Trunks defined as Tie line – Q-Sig/DPNSS
All TCP/IP	Trunks defined as TCP/IP
Unassigned trunks	Any trunks with type set to unassigned

Viewing groups

To view the members of a group click on the Group required and select 'View or Edit the group'. The group members are listed in a grid. You can sort the members in different ways by selecting the column header. For example, to list the extensions in an extension group in order of extension number click on the 'Number' column, alternatively to list by Name in alphabetical order click on the 'Name' column and so forth.

Identifying stray devices using 'Unassigned' groups

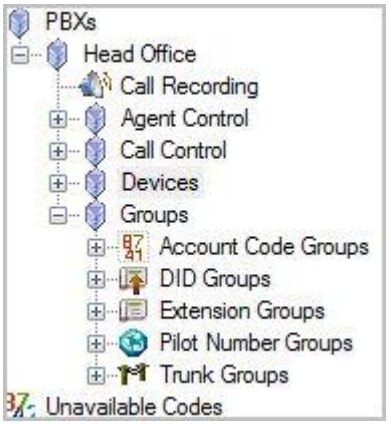
It is good practice to assign you various devices to custom groups that you have created. Any devices that are not specifically assigned to a group will remain in the unassigned group. By viewing the unassigned group for a particular device or by running a report to list the unassigned devices you can quickly track down any devices that have not been accounted for. These devices may be either unused, incorrectly configured or have been automatically configured and not yet assigned.

You can also identify infrequently used devices by running the system report designed for that purpose (See reporting).

User Defined Groups

Creating a user defined group

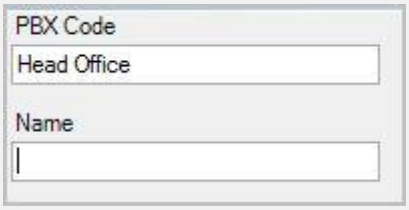
To configure Groups Double click the Configure -> Telephone Systems ->PBX (in most cases there will be only one). Click on the 'Groups' icon and select the group type.



The instructions of how to create a group are the same for extensions, trunks, account codes, pilot numbers etc. The following examples are with the use of extensions:

How To: Creating a group

1) From the MyCalls Telephone System Configuration screen, click 'Extension Groups'
2) Click 'Create an Extension Group' in the Extension Groups configuration area. The Create a New Extension Group screen appears.
3) In the dialog window that appears, a number of fields are available for entry. Some are mandatory fields* whilst others are optional as outlined below.



4) **PBX Code:** This field is filled with the assigned name of the PBX currently being configured. (Read Only)
5) **Name*:** Enter a name to identify the Extension group for reporting on.
6) Click 'OK'

Once the device group has been created you should add devices to it. You can either, open the group editing- view and add new devices or you will need to edit existing devices in order to add them to your new group.

How To: Adding an existing device to a group

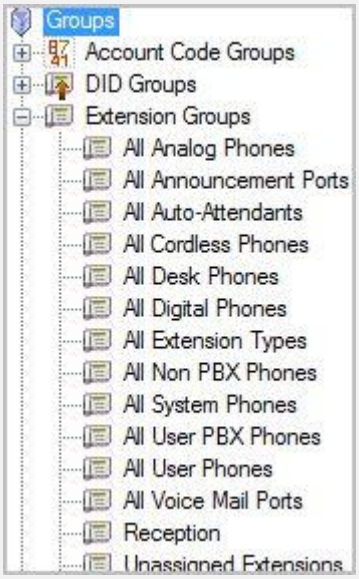
1) From the MyCalls Telephone System Configuration screen, click to expand 'Extensions'
2) Click on 'Create or edit an extension'

3) A dialog showing existing extensions will appear
4) From the list of extensions find the extension you wish to add to the group
5) Click in the group column and select the group you wish to add the extension to
6) Repeat this for any other extensions
7) Click 'OK'
8) Your extensions are now assigned to the user defined groups

Having added devices to a group you can then go back and edit the device attributes from within the group window.

How To: Editing devices within a group

9) From the MyCalls Telephone System Configuration screen, click to expand 'Extension Groups'

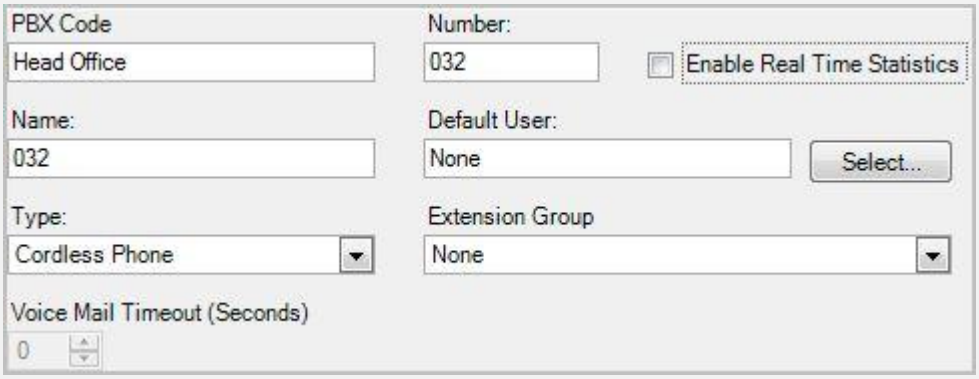


10) Select the group you want to edit. Click 'View or Edit the Group' in the Extension Group configuration area.
11) If the group already contains devices then you can edit each device as described below. Alternatively you can press the 'Add New Device' button and this will display the device configuration dialog as described previously. Once configured press 'OK' and the new device will be added to the group.

Number	Name	Type	Group	Enable Statistics	
208	208	Unassigned	None	☑	Edit...
235	Reception	Digital Desk Phone	Sales	☑	Edit...
236	236	Unassigned	None	☐	Edit...
237	237	Unassigned	None	☑	Edit...
300	Mark	Digital Desk Phone	Sales	☑	Edit...
301	Max	Digital Desk Phone	Reception	☑	Edit...

12) In the dialog box that appears you can change the extension name, choose the type of device, change group membership, edit the device and choose whether to enable statistics.

13) Clicking on the 'Edit' button allows you to modify the default user and set a voicemail timeout if the device is assigned a type of auto-attendant, voicemail or announcement port.



14) If you have clicked 'Edit' to edit the device settings then Click 'OK' to close the dialog

15) Finally once you have finished editing the devices within the group click 'OK'

You may also wish to delete a group

How To: Delete a group

1) From the MyCalls Telephone System Configuration screen, click 'Extension Groups' and select the group you want to delete.

2) Click 'Delete Extension Group' in the Extension Group configuration area.

View or Edit the Group
Use the View or Edit the Group wizard the view or changes the members for this group.
Edit Extension Group Configuration
Use the Edit Extension Group Configuration wizard to change the user defined notes of the extension group.
Delete Extension Group
Use the Delete Extension Group wizard to delete the extension group.

3) You will be prompted to confirm deletion of the selected group.

4) Click 'OK'

Quick tip:

When a group is deleted all of the member devices of that group will have their user defined group set to 'none'

When a group is deleted all of the member devices of that group will have their user defined group set to 'none'

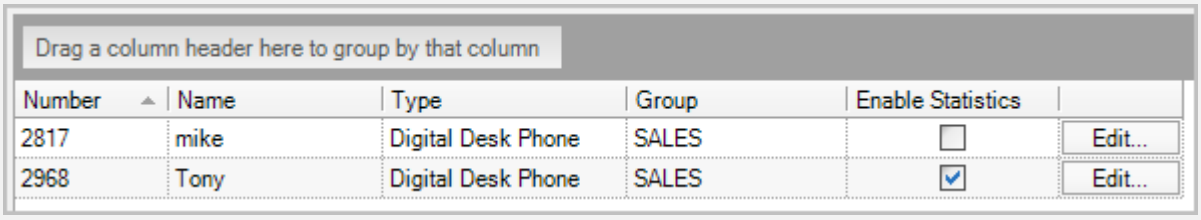
Alarms will be deleted if they are configured to a group that is going to be deleted

System groups cannot be deleted

You can also remove a device from a group.

How To: View or Edit group membership

1) From the MyCalls Telephone System Configuration screen, click 'Extension Groups' and select the group you want to configure.
2) Click 'View or Edit the Group' in the Extension Group configuration area.
3) In the dialog window that appears you will see a list of group members which have already been created, alternatively you can create new members for the group by clicking on the 'Add new extension' button and creating a new member directly in the group.
4) Each group member will show details of the member for example extension number, name, device type group and whether or not real time statistics are enabled.

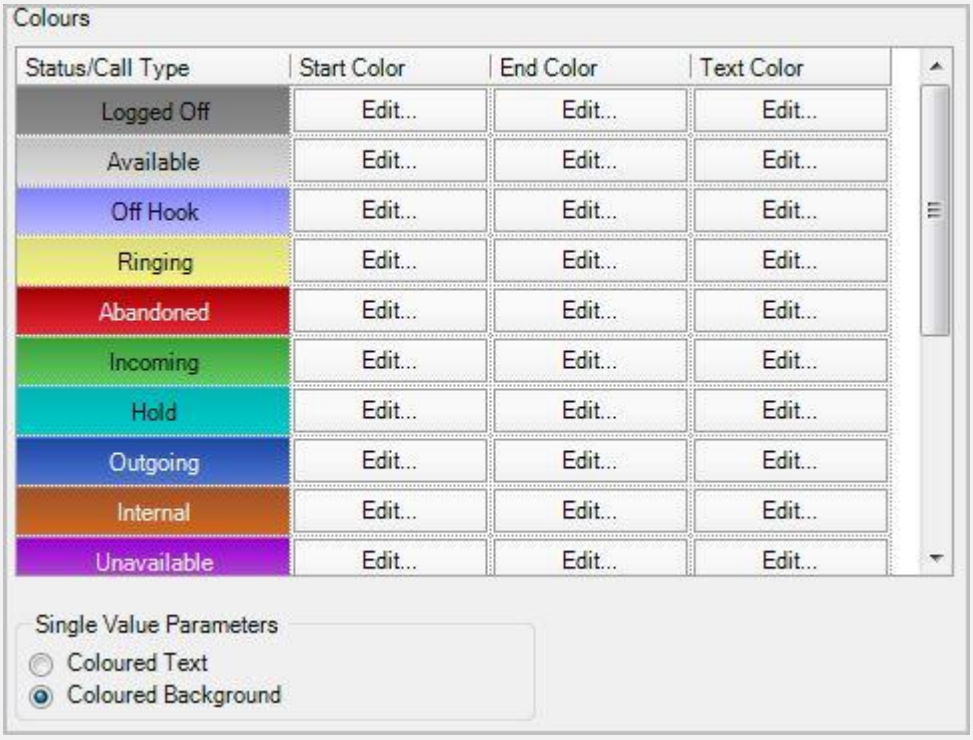


5) You can edit the Device Name, Type, Group, Enable statistics. You can also edit the default user for the device by selecting the 'Edit' button. Changing the group will remove the device from this group once the 'OK' button is selected.

Miscellaneous configuration

How To: Configuring colours

1) The colours can be changed to represent the various extension states and call types.
2) To change the colours click Configure -> Colours
3) To alter the colours, click 'Edit' next to the section you wish to change, for example, logged off end colour.



4) Click 'OK'
5) Colours apply to all users and are system wide. Colours for different call types tend to be similar, Reds for abandoned, Greens for incoming, Blues for outgoing, Neutral colours for ACD and User related status.

System settings

In order for reports and alarms to be distributed to various people in your organization you will need to configure one or more mechanisms to transport the information to the intended recipient.

NB: You will normally require the assistance of an IT administrator to set up system related settings

Email

Information can be sent to one or more email address. To achieve this, the system needs to be set up with an email sending mechanism via an smtp service.

How to: Set up an Email server.

1) **SMTP mail server**: name of your email sending server e.g. mail.myco.com or smtp.myco.com
2) **Email address of sender**: This will appear in the 'from' field of any emails sent by the system. This should be a valid email address on the server and ideally will relate to MyCalls e.g. Mycalls@my.com.
3) **Login Username**: username if required to access your SMTP service
4) **Login Password**: password if required to access your SMTP service
5) **Test**: this will send a test email to a known email address to check your system is capable of sending emails using the settings you have specified

FTP

Information can be deposited as a file on an FTP server for later retrieval by an FTP client application or web browser.

How to: Set up an FTP server.

1) Configuration -> System settings
2) **FTP server hostname**: name of your ftp server e.g. ftp.myco.com
3) **Anonymous**: Defines if the account on the ftp server is capable of handling uploads from an anonymous user in which case a username and password are not required
4) **Login Username**: username required to access your FTP service
5) **Login Password**: password required to access your FTP service
6) **Test**: this will test the connection to the FTP server specified

Grade of service and Grace periods

What is Grade of Service (GOS)

You may specify the limits after which a call is treated as having rung or lasted too long. You can also configure the relative importance of these limits. Note that overflowed calls are regarded as incoming calls for the purposes of Grade of Service.

General 'Grade of Service' is used to measure the percentage of calls which were answered within the target ring time for that department or group compared with the total number of answered calls for that department or group. The total number of calls can include long wait calls where the ring time extends beyond the target ring time configured.

Long Waits = number of answered calls which rang for longer than the target maximum ring time

$$General\ Service\ level = \frac{Incoming\ connected\ calls - long\ waits}{Incoming\ connected\ calls} * 100$$

Abandoned 'Grade of Service' measures the percentage of calls which were answered within the target ring time for that department or group compared the total answered calls plus the long abandoned calls.

Long abandoned calls are those calls which were abandoned after the minimum abandonment time i.e. genuine abandoned calls.

$$Abandoned\ Service\ level = \frac{Incoming\ connected\ calls - long\ waits}{Incoming\ connected\ calls + Long\ Abandoned\ calls} * 100$$

Service levels can be displayed as single value performance statistic, included in custom reports and also set alarms based on call performance.

Long Calls

The Grade of service configuration allows us to set the Incoming call duration limits, outgoing call duration limits and internal call duration limits. These allow us to define the limits for long calls.

Long calls can be displayed as Single value performance statistics, included in custom reports and also set alarms based on call performance.

To access grades of service and grace periods:

Click 'Configure' -> 'operational settings' and then either 'grade of service' or 'grace periods'.

Grade of service configuration

Grade of service can be configured across the whole organization or specified on a group by group basis. Within the Grade of service configuration screen you add the groups required to the list of Active groups.

Specify for each group the settings for the following:

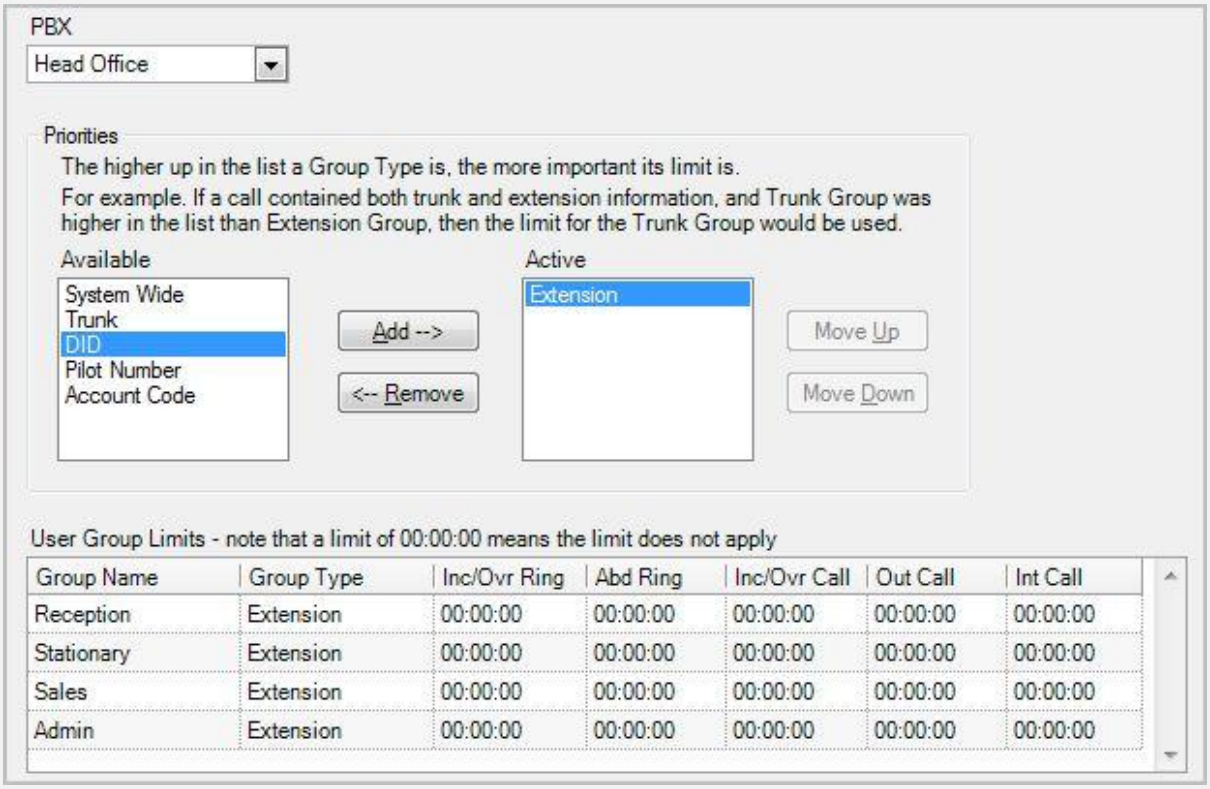
Incoming/Overflow ring time: If a call rings for longer than this period then the call will be treated as a long ring.

Abandoned ring time: If a call was abandoned after ringing for more than this time then the abandoned ring will be treated as too long.

Incoming/Overflow call duration, Outgoing and internal call durations: Specified the maximum length of call. Any call lasting longer than this time is considered a long call.

How To: Configure Grade of Service:

1) Configure -> Operational Settings -> Grade of Service
2) Select the device from the 'available' list on the left side e.g. Extension
3) Click 'Add'. This will transfer the available device group to the list of active groups for which limits can be set. Each group defined for that device will be listed in the grid. You can then define a set of limits for each specific group.
4) The' Move up' and Move Down buttons allow you to define which limits will be used for a call. If for example a call has both DID and Extension information then the Grade of Service group higher up in the list will be used to calculate the Grade of Service for that call.


PBX
Head Office
Priorities
The higher up in the list a Group Type is, the more important its limit is.
For example. If a call contained both trunk and extension information, and Trunk Group was higher in the list than Extension Group, then the limit for the Trunk Group would be used.
Available
System Wide
Trunk
DID
Pilot Number
Account Code
Add -->
<-- Remove
Active
Extension
Move Up
Move Down
User Group Limits - note that a limit of 00:00:00 means the limit does not apply
Group Name | Group Type | Inc/Ovr Ring | Abd Ring | Inc/Ovr Call | Out Call | Int Call
Reception | Extension | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00
Stationary | Extension | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00
Sales | Extension | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00
Admin | Extension | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00 | 00:00:00

5) Click 'OK'
6) To remove a device, simply select the device in the 'active' section on the right side, e.g. extension and click 'remove'
7) Click 'OK'

Grace periods

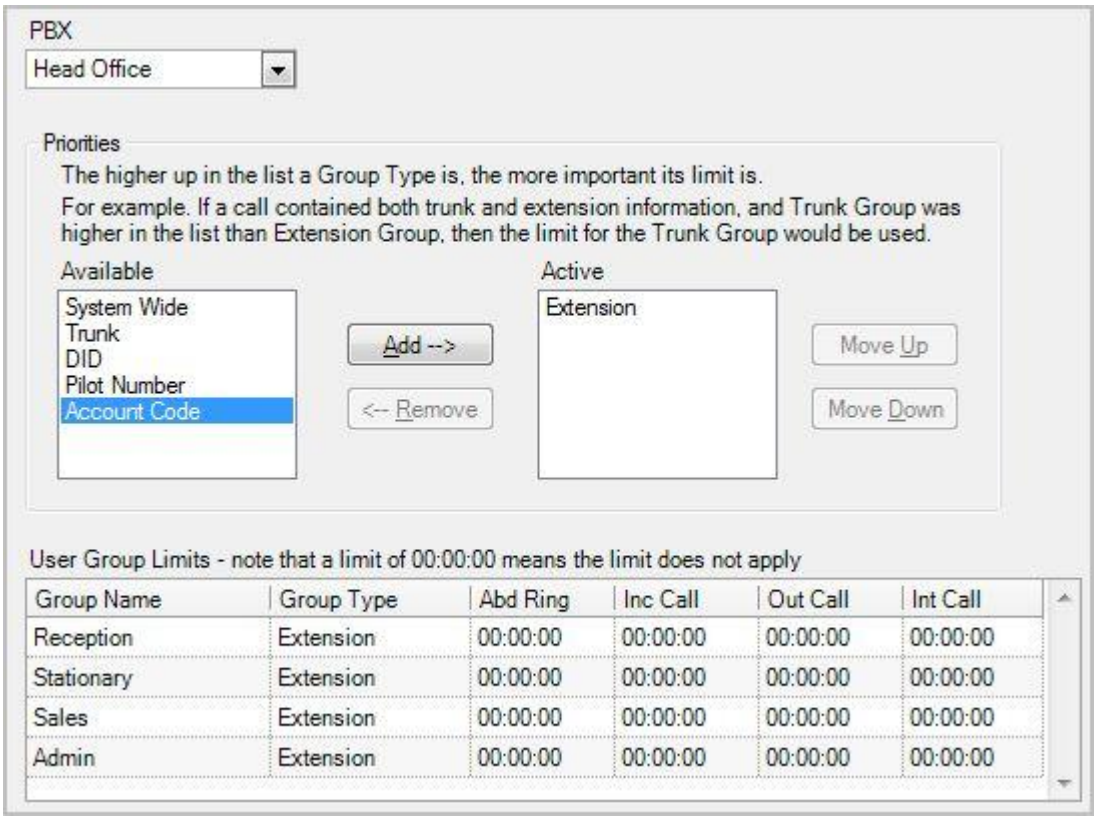
What are grace periods?

Grace periods allow you to specify the minimum ring time an abandoned call must have, and the minimum call time incoming, outgoing and internal calls must have, to be regarded as true calls. Only true calls will be used in the call statistics.

You can define grace periods on the following

- Abandoned Wait Time
- Incoming Call Duration
- Outgoing Call Duration
- Intercom Call Duration

Grace periods configuration



Chapter 9

Organisation and Users

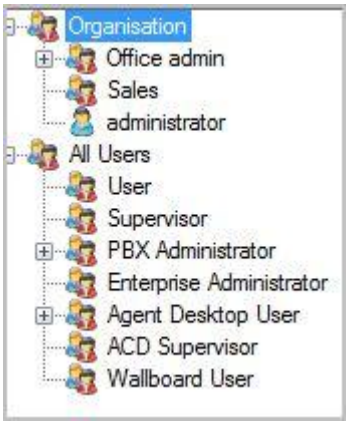
Organisation view

Companies are generally arranged in a hierarchical structure be it a complex one that has multiple sites, divisions, departments and teams or a simpler scenario where there are groups of people that are arranged in groups to reflect their functions.

It is possible to emulate this structure within MyCalls and then run reports and gather statistics on how different areas of the business are performing and using the telephone system. The structure you create is intended to allow you to recreate business groupings rather than sometimes forced groupings when looking at the type of extension or the pilot group that the call came in on. These two approaches are intended to complement each other and allow you to produce reports on exactly what you want to see.

The organisation is created as a series of groups and users within those groups. There are no limits on the number of users, groups or levels of groupings that can be created.

The organisation configuration can be shown by selecting the Organisation option from the Configure menu or by pressing the icon from the main toolbar.



Under the item "Organisation" the hierarchical structure is shown. Expand each item to see the other sub-groups that form part of the selected group.

Under the item "All Users" the users are grouped by their role within the MyCalls system.

Why Configure Users

Whilst it is permissible to only configure MyCalls to use devices e.g. extensions, in order to track and report calls it is always advisable to create a user configuration for several reasons

Users can be organised hierarchically thus reports can group information in terms of groups and subgroups. For example if you have several sales groups then a hierarchical view will allow you to create several subgroups under an overall group called Sales. Reports can then be performed on the overall performance of sales as well as each sales group within the sales department.

Users can be responsible for more than one extension thus reports can be generated to record the user rather than the extension activity.

ACD requires the creation of users for logging on and off queues.

Understanding User Roles

Assigning the appropriate roles to users will allow control of the system to be carefully governed and thus reduce the risk of untrained users making damaging configuration changes or running reports that they should not see.

	Agent Desktop User	**WB User**	**User**	**Supervisor**	**ACD Supervisor**	**PBX Admin**	**Enterprise Admin**
View Agent Desktop Layout	•	•	•	•	•	•	•
Create Real Time windows		•	•	•	•	•	•
Save/ Load screen layouts		•	•	•	•	•	•
View Live Call Records/ Alarm/ Audit Entries	•		•	•	•	•	•
ACD Real Time		•			•		
Configure/ Run Reports				•	•	•	•
ACD Reports					•		
Configure Collectors						•	•
Configure Telephone System/ Organisation/ Callers/ Costs/ Alarms						•	•

Backup/ Restore database						•	•
Remove unwanted information						•	•
Import Bill						•	•
Re-Cost Calls						•	•

Organisation Group Configuration

Organisational Groups are the logical groups of employees that exist within the organization. They are arranged in a hierarchy and groups can exist within other groups. It is typical that an organization be split up into different departments and then maybe different teams.

How To: Creating a new Organisation group

1) From the Organisational Groups Configuration screen, click 'Organisation'

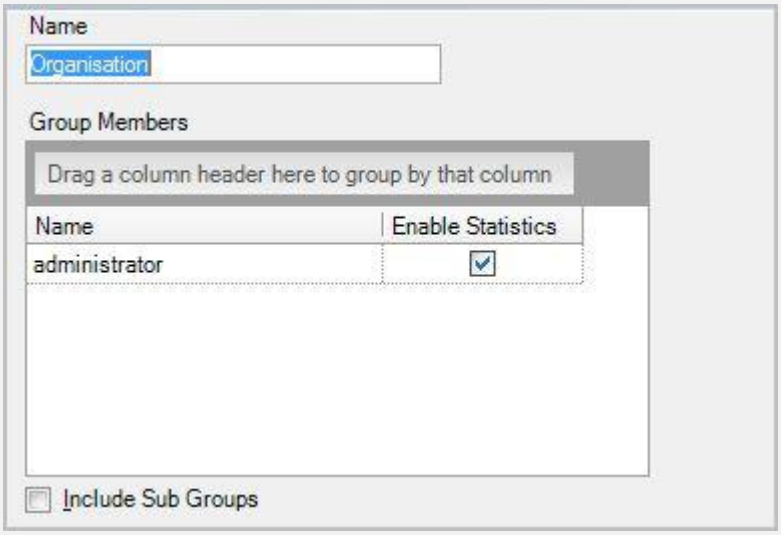
2) click 'Create a New Group'
3) In the 'Create a New Organisational Group' window you must enter a name for the group, and you can enter notes to describe the group.
4) **Name***: Enter a name to describe the organisation group you are creating.
5) Click 'OK'

How To: Editing organisation group configuration

1) From the Organisational Group Configuration screen, click to expand 'Organisation' and select the group you want to edit.

2) Click 'Edit Organisation Group' in the Organisational Group Configuration area

3) In the 'Edit an Organisational Group' window that appears you can enter notes to describe your selected group. In the Group Members window you will see members currently assigned to the organisation group. If you have sub groups below this group then you can include those members by selecting the 'Include Sub Groups' option. If members are displayed in this window then you can choose whether to collect real time statistics on the member in the group by selecting the 'Enable Statistics' option.



4) Click 'OK'

Deleting Organisation Groups

How To: Delete Organisation group configuration

1) From the Organisational Configuration screen click to expand 'Organisation'
2) Select the group you want to delete e.g. office admin.

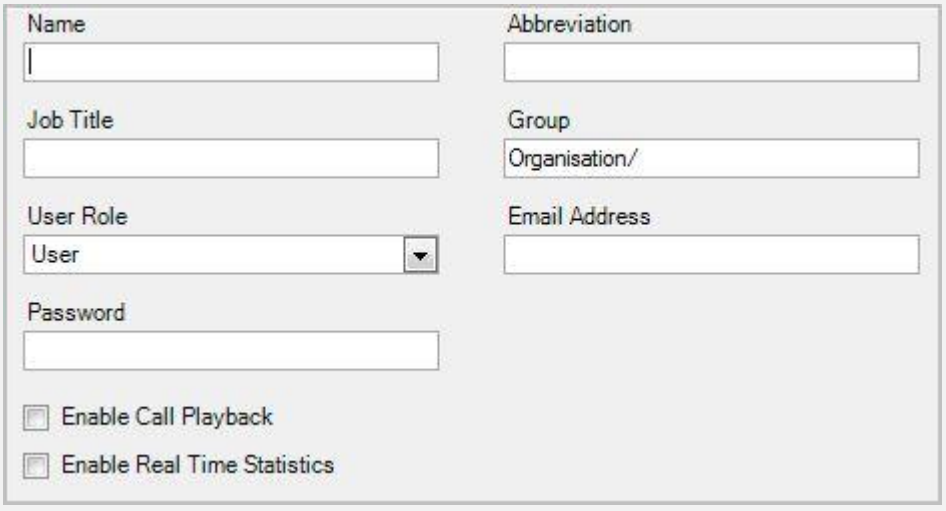
3) Click 'Delete Group' in the Organisational Group configuration area.
4) You will be prompted to confirm deletion of the selected group.
5) Click 'OK'

User Configuration

Users are generally people employed by the organization. By configuring users it will be possible to report on the activity of people rather than extensions. This is very useful where a person may move between several desks and telephones.

How To: Creating a new User

1) At the Organisational Configuration screen, click 'Create a New User'.
2) The Create a New User screen is displayed.
3) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.

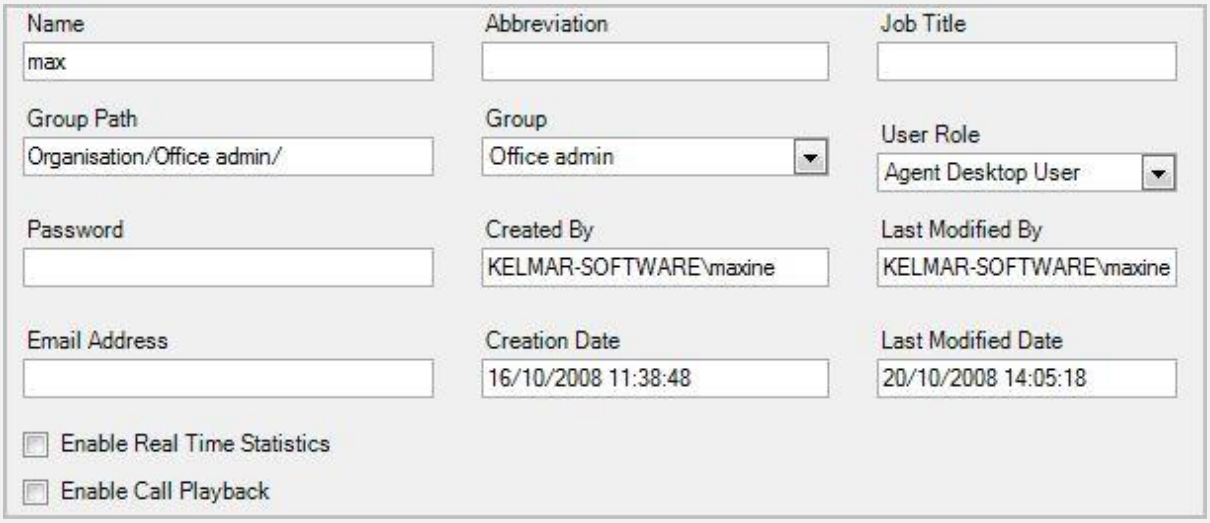


4) **Name*:** Enter the users name here that will be used to identify them in the system.
5) **Abbreviation**: If the user has an abbreviated name or nickname they would like to be known by then you can enter it here in this field.
6) **Job Title**: Enter a job title to describe the users' position within the organization.
7) **User Role***: Select a user role for your user from the pre-defined list.
8) **Email Address**: You can enter an email address for your user so that if they are configured as an Administrative User of an organization group then they receive reports and alarms on that groups activity directly.
9) **Password**: If the user is required to enter a password to login then enter one in here.
10) **Enable Call Playback**: If the user is going to need to listen to recorded conversations then they will need to enable this option to do so.
11) **Enable Real Time Statistics**: For real time statistics to be collected for the user this option needs to be enabled. If you no longer with to collect info on the user then turn this option off.
12) Click 'OK'
13) The caller should now be visible in Configure Organisation Structure window.

Once a user has been created there needs to be at least one PBX administrator created as these are the only users that can do further modifications to the configuration. If you do not create a PBX administrator then contact your maintainer who can fix it for you.

How To: Editing an existing User

1) From the Organisational Configuration screen, click 'Organisation'
2) Select the user you want to edit by expanding the group the user is in and clicking on the user. E.g. If you want to edit Max, select Max from the organization hierarchy.
3) Click 'Edit User Configuration' in the Users configuration area.
4) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



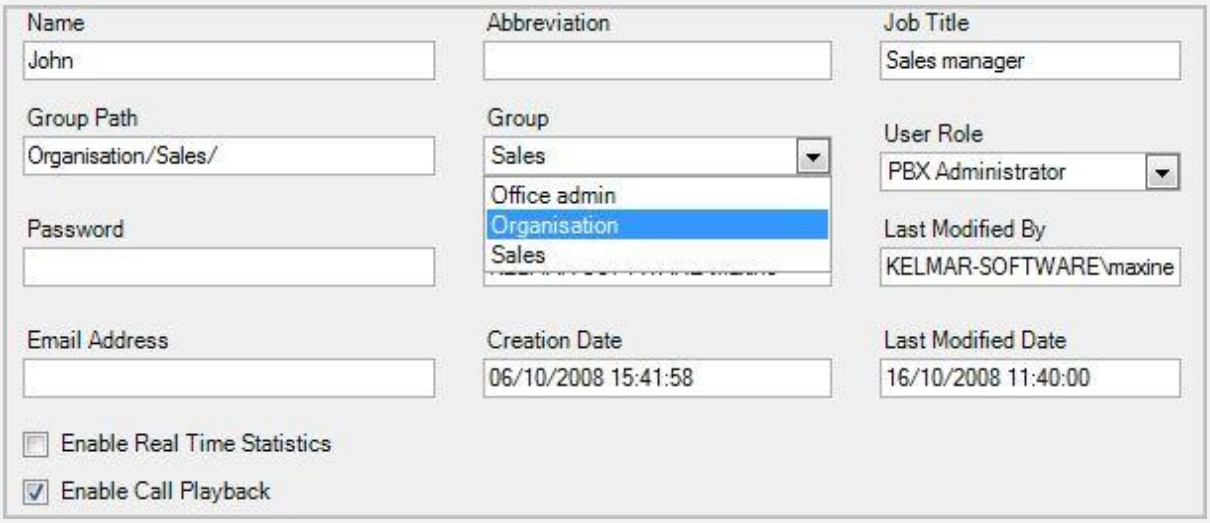
5) **Name*:** Enter the users name here that will be used to identify them in the system.
6) **Abbreviation**: If the user has an abbreviated name or nickname they would like to be known by then you can enter it here in this field.
7) **Job Title**: Enter a job title to describe the users' position within the organization.
8) **User Role***: Select a user role for your user from the pre-defined list.
9) **Email Address**: You can enter an email address for your user so that if they are configured as an Administrative User of an organization group then they receive reports and alarms on that groups activity directly.
10) **Password**: If the user is required to enter a password to login then enter one in here.
11) **Enable Call Playback**: If the user is going to need to listen to recorded conversations then they will need to enable this option to do so.
12) **Enable Real Time Statistics**: For real time statistics to be collected for the user this option needs to be enabled. If you no longer with to collect info on the user then turn this option off.
13) Once you are happy with the changes you have made, click 'OK'

How To: Deleting a User

1) From the Organisational Configuration screen expand 'organisation'
2) Select the group that the user you want to delete belongs to and select the user
3) Click 'Delete user'
4) You will be prompted to confirm deletion of the selected User.
5) Clicking 'Yes' will delete the user whilst clicking 'No' will cancel the action.

How To: Assigning Users to a group

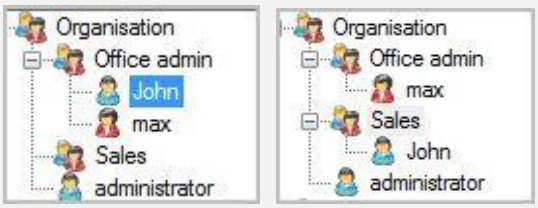
1) If you have configured User Groups then you can group individual users within a group to enhance real time statistics and make reporting easier.
2) The easiest method to assign a user is to simply drag and drop them from the organization structure to the group. From the Organisational Configuration screen, select the user you want to assign to a group and drag across to the group and release the left mouse button.
3) You can also use the 'Edit User Configuration' window to change the organisation group.



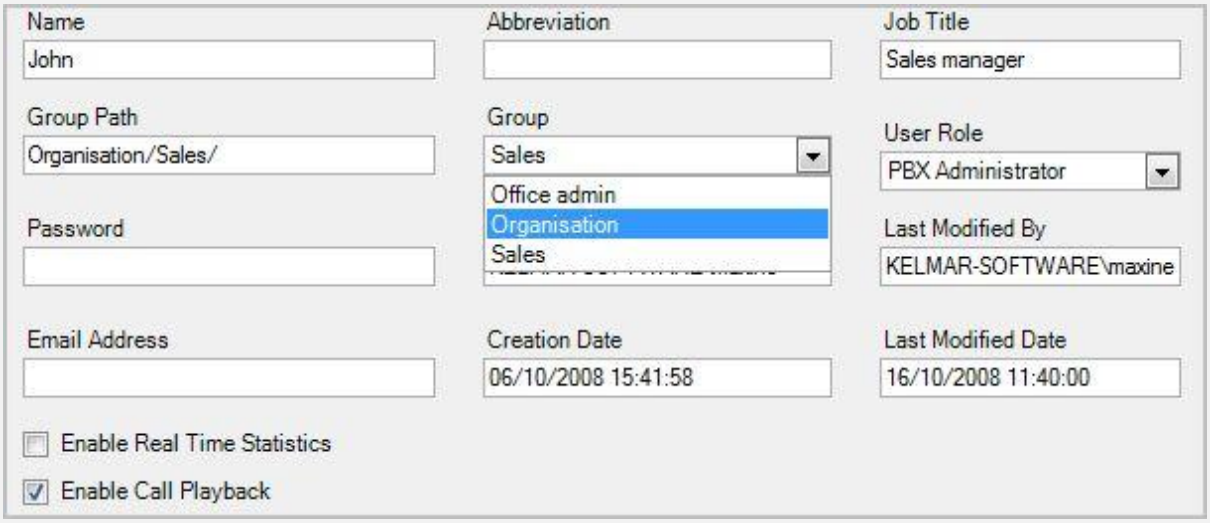
4) When you are happy with your users selected groups click 'OK' to save your changes.

How To: Removing a User from a group

1) The easiest method to remove a user from a group is to drag them from the group they are in and drop them in another group in the organizational hierarchy. Simply select the user by hovering over them and clicking the left button on the mouse, drag them over to the group you want to move them to and release the left mouse button.
2) For example, move John from office admin into sales.



3) If you want to remove the user from all groups, you can put them in the top level of the hierarchy by hovering over the Organisation group and releasing the mouse.
4) You can also use the 'Edit User Configuration' window to change the organisation group.
5) Select the user you wish to remove from a group
6) Click 'Edit User Configuration'



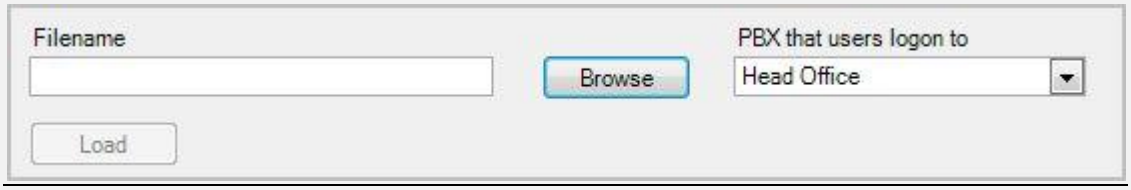
7) In the window that appears simply use the drop down menu 'group' and assign them to a different group.
8) Click 'OK'

Importing users:

You can import a csv (comma separated values) file directly into MyCalls to speed up user setup. This file should include the following columns Name, Abbreviation, Password, Email Address, Job Title, Login PIN, Default Extension in that order to be imported successfully.

How To: Import Users

1) From the Organisational Configuration screen, click 'Import Users'



2) In the window that is displayed, select a valid .csv file by clicking the 'Browse' button, navigating to the file then selecting it, and clicking 'Open'.
3) On the Import Callers window click 'Load' to populate the Users to Import list box with any valid entries from the CSV file that have been found.
4) Further editing is possible in the grid before committal.
5) Click 'OK'

Chapter 10

MyCalls Desktop

Desktop call control provides a range of functions allowing users to control their phone operations directly from the screen. As well as the ability to dial out, answer calls and transfer you will have instant access to advanced phone features such as forwarding, call-back, call parking and brokering. Call control uses a real time event stream from the telephone system to monitor both your own extension and other extensions in the system.

Call control is an optional extra to the MyCalls application and can, when purchased, be integrated into the main MyCalls application or run as an independent program called the MyCalls Desktop.

It is possible to run MyCalls Desktop with any of the MyCalls products, Basic, Call Manager, Call Centre, Enterprise or Recorder.

Architecture of the call control system

Call control is based around the principle that a MyCalls user, logging on to the system, is able to control an extension of their choice. Each user created in MyCalls can be enabled for call control by the PBX administrator. When a user logs in to MyCalls they will normally be associated with an extension automatically. If a user does not want to control their default extension they will be allowed to choose an extension to control. It is possible that a user may be the default user for more than one extension in which case the user is given a choice of extensions to control.

Having selected an extension to control the user is presented with a call control toolbar. This toolbar can be docked in the MyCalls application or can be undocked and positioned anywhere on the desktop. The toolbar can be locked in place and if space is a premium it can be displayed in a compact format.

In addition to the call control toolbar the call control functionality also includes an Actions screen and an Address Book. These are described in more detail in the appropriate sections.

MyCalls Desktop

MyCalls Desktop is a stand-alone application which provides all the call control and screen-pop functionality of MyCalls without the call management capabilities.

If you are using the MyCalls desktop application you will have access to the call control capabilities, the actions and contact address book as well as screen-popping and basic call logs. The following

information refers to the MyCalls integrated application and where the MyCalls Desktop product differs, this is highlighted.

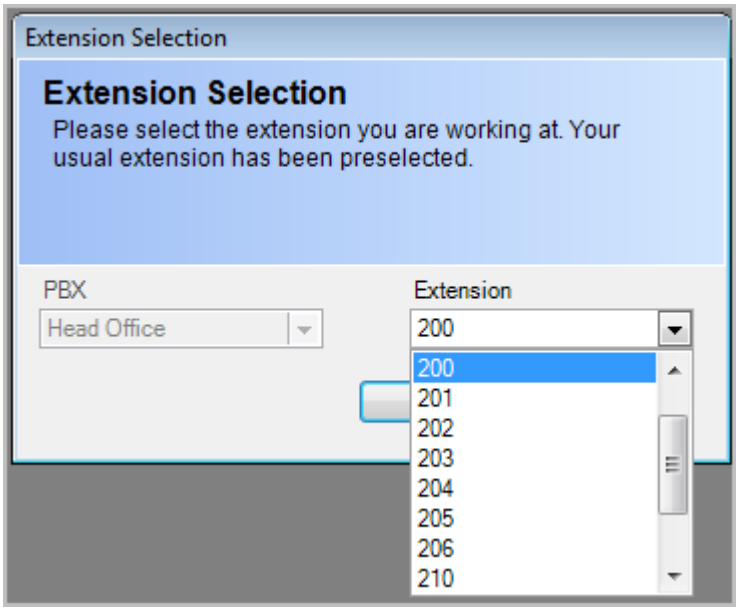
Logging on to the MyCalls Call Control /Desktop Environment

MyCalls now offers call control users a hot-desk facility. This enables a user to log onto any extension of their choice. Users must be specifically enabled for hot-desking otherwise they will be restricted to their default extension. In addition, extensions enabled for hot desking will appear in the list of available extensions as well as any extensions for which the user is marked as the default user when the user logs on to MyCalls or MyCalls desktop.

To Summarise:

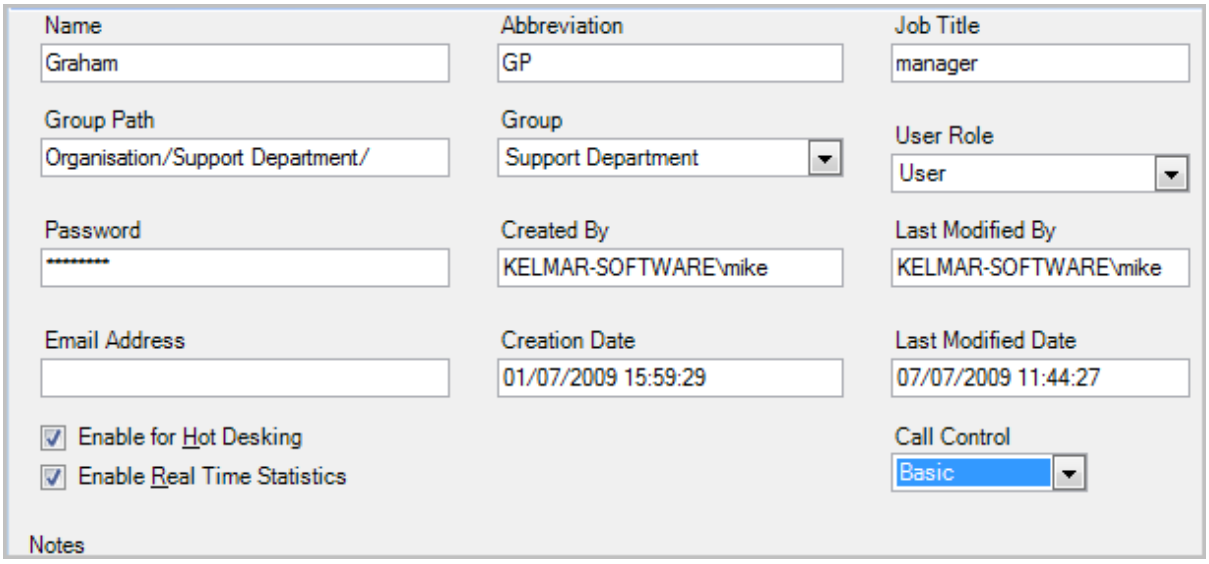
- Only Users enabled for Hot Desking can select an extension other than their default
- Any Extensions enabled for Hot Desking will appear in the list of available extensions when logging on as well as the extensions for which the user is the default user

Once the hot desking options have been enabled for both users and extensions then the user will be presented with the extension list whenever they log on to MyCalls.

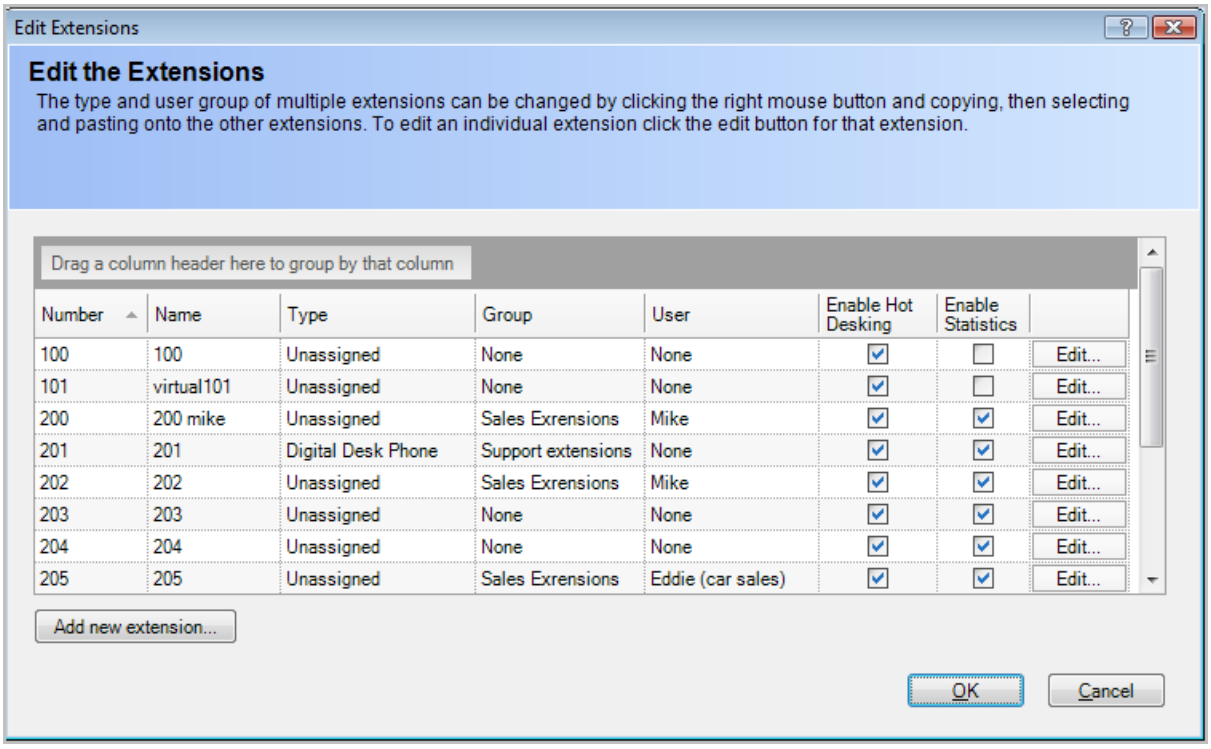


The user should select the extension that they wish to control which will then be the extension controlled from the call control toolbar etc.

Users can be enabled for hot desking in the user configuration dialog.



Extensions can be enabled for hot desking in the extensions configuration dialog.

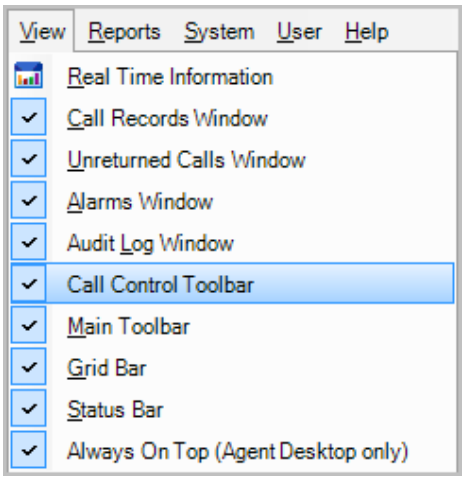

Edit Extensions
Edit the Extensions
The type and user group of multiple extensions can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other extensions. To edit an individual extension click the edit button for that extension.
Drag a column header here to group by that column
Number
Name
Type
Group
User
Enable Hot Desking
Enable Statistics
100 100 Unassigned None None Edit...
101 virtual101 Unassigned None None Edit...
200 200 mike Unassigned Sales Exrensions Mike Edit...
201 201 Digital Desk Phone Support extensions None Edit...
202 202 Unassigned Sales Exrensions Mike Edit...
203 203 Unassigned None None Edit...
204 204 Unassigned None None Edit...
205 205 Unassigned Sales Exrensions Eddie (car sales) Edit...
Add new extension...
OK
Cancel

For more details on extension configuration see the device configuration section.

MyCalls Call Control Toolbar

The Call Control Toolbar is displayed as a separate screen element which can, if required be docked into the main MyCalls application. From this toolbar you can manage the call control features such as dialling, answering, transfers etc as well as basic call control and screen-pop configuration.

The toolbar can be made visible from the 'View' menu within MyCalls



How To: Dock the toolbar

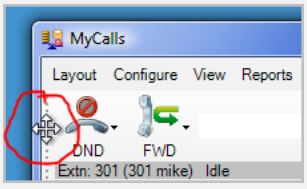
Click on the MyCalls Control Toolbar

Drag over the MyCalls Application

Release the mouse button and the toolbar will automatically dock onto the application

How To: Undock the toolbar

Click on the dotted docking area of the toolbar



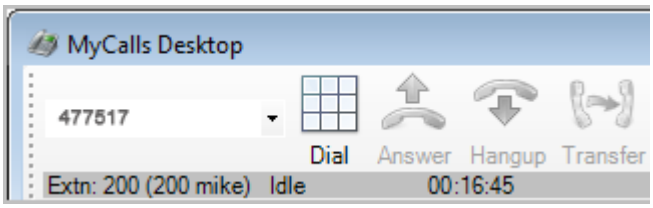
Drag outside the application window

Release the mouse button to drop the toolbar onto the desktop

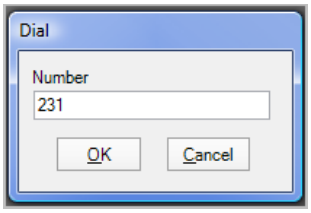
To re-dock the control toolbar simply drag the toolbar over the MyCalls application and release the mouse

Using the MyCalls Control toolbar functions

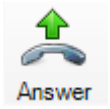
Dial – Call another phone by entering a number in the dropdown box and either clicking the 'Dial' icon or hitting the enter key.



Alternatively clicking on the Dial Icon pops a dialogue asking for the number to dial. Simply enter the number and click 'OK' to initiate the call.

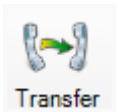


Answer – simulates picking up the extension handset. Depending on the phone type the external microphone and speaker may be enabled.



Hold/Recall – Puts the extension on hold or recalls a call currently held.

Transfer – Allows supervised or blind transfer operation. Supervised will keep the phone connected until the transfer target extension is answered and you specifically complete the transfer. A blind transfer automatically hangs up your extension once the transfer target is dialled and begins to ring.

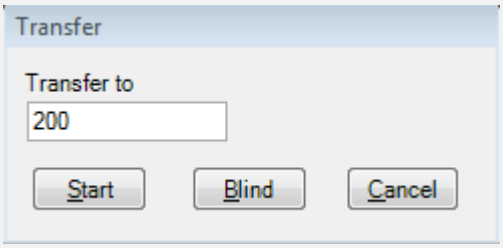


How To: Make a Supervised transfer

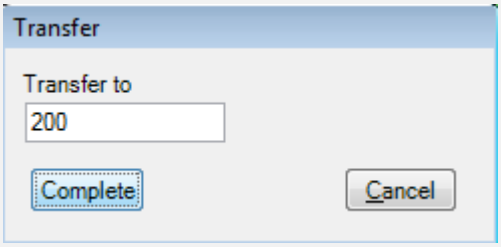
Once the call is connected click the Transfer Icon

Enter the number to transfer the call to in the 'Transfer to' box

1 - Click Start to initiate the transfer; this will call the number you wish to transfer the call to.



2 - Once you have established a connection select 'Complete'



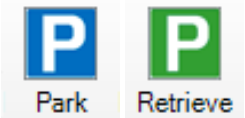
3 - Hang up your phone, the transfer is complete

If you wish to establish a blind transfer then simply select 'Blind' rather than Start in step 1 above and hang up your extension.

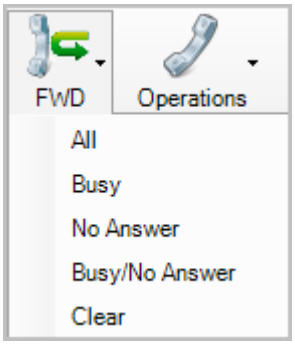
Park and Retrieve – The system provides a number of orbits into which you may park a call whist attending to other business such as answering another call or attempting to ring another party. You may park an active call in an orbit of your choice.

When you press the 'Park' icon the orbit dialogue appears. Simply select the orbit into which you wish to park the call and click 'OK', the call is then parked. Retrieval is the complimentary operation to parking. Select retrieve and then select the orbit you wish to retrieve the call from. The retrieved call then becomes active on your extension. You may have several calls parked at once. If you forget to retrieve a parked call then the phone system will automatically ring your extension and reconnect you to that call after a preset delay.

NB: there may be restrictions in which orbits can be used dependent on the setup of your phone system.

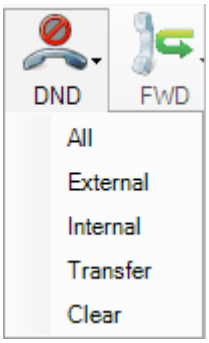


Forward – Various Forward options are available:



- All – Forwards all calls to another extension or number
- Busy – forwards calls when your extension is busy
- No Answer – Forward calls when you do not answer your extension
- Busy/No Answer – Forward calls when busy or no answer occurs
- Clear – Reset any forwarding settings

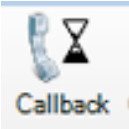
Do not disturb (DND) – Various DND options are available:



- All – Extension will not respond to any calls
- External – Extension will not respond to external calls
- Internal – Extension will not respond to internal calls
- Transfer – Extension will not respond to transferred calls
- Clear – Reset any DND settings

Hang-up – Hangs up the phone

Callback (Camp on/off) – If an extension is busy you can set a call-back on that extension so that when the extension becomes free you will be automatically called back. This operation is also known as 'camping on' the extension. To set a call-back, simply click the call-back icon whilst the extension is ringing and then hang up. You may only set one call-back at a time.



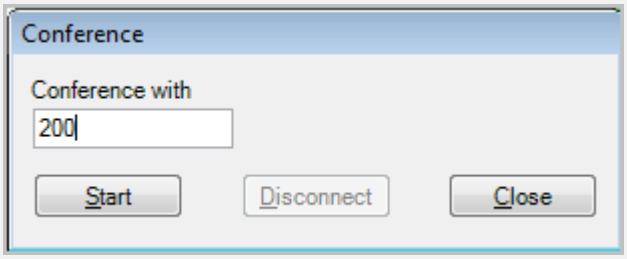
Barge in – Join an existing conversation. This can be as a passive listener or an active participant dependent on the PBX settings.

Broker – Allows you to switch between an active call and a held call. once you have both calls ongoing then simply click on the broker icon to switch between them.

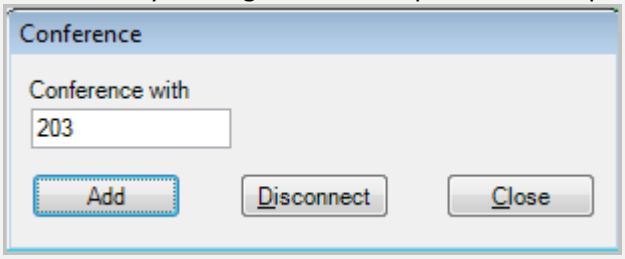
Conference – Allows you to easily add other parties to your call.

How To: Set up a conference call

Having set up a two way conversation additional parties can be added into the call by selecting conference and specifying the extension or external number to add.

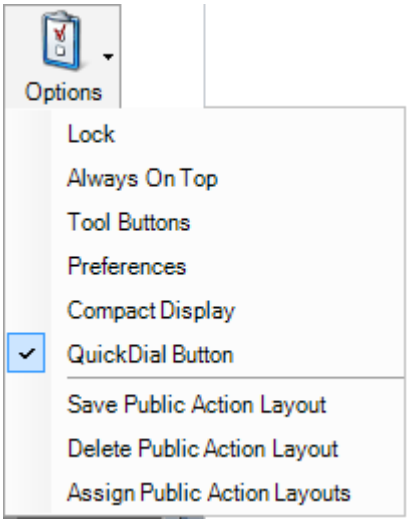


This will dial the required number and once connected you can then add the new party to the conference by clicking ‘Add’ and Repeat for other parties you wish to include in the call.



Toolbar Options

The toolbar options Icon provides a list of options which can control the operation of the call control.



Always on top – Ensures the Call Control toolbar is always visible on the desktop.

Compact Display – reduces the toolbar size to minimise space taken up on the screen.

Quickdial button – provides a button which can be placed anywhere on the screen and allows the user to select a number from any application visible on the desktop such as a website or spreadsheet. Pressing the quickdial button then immediately dials the selected number.

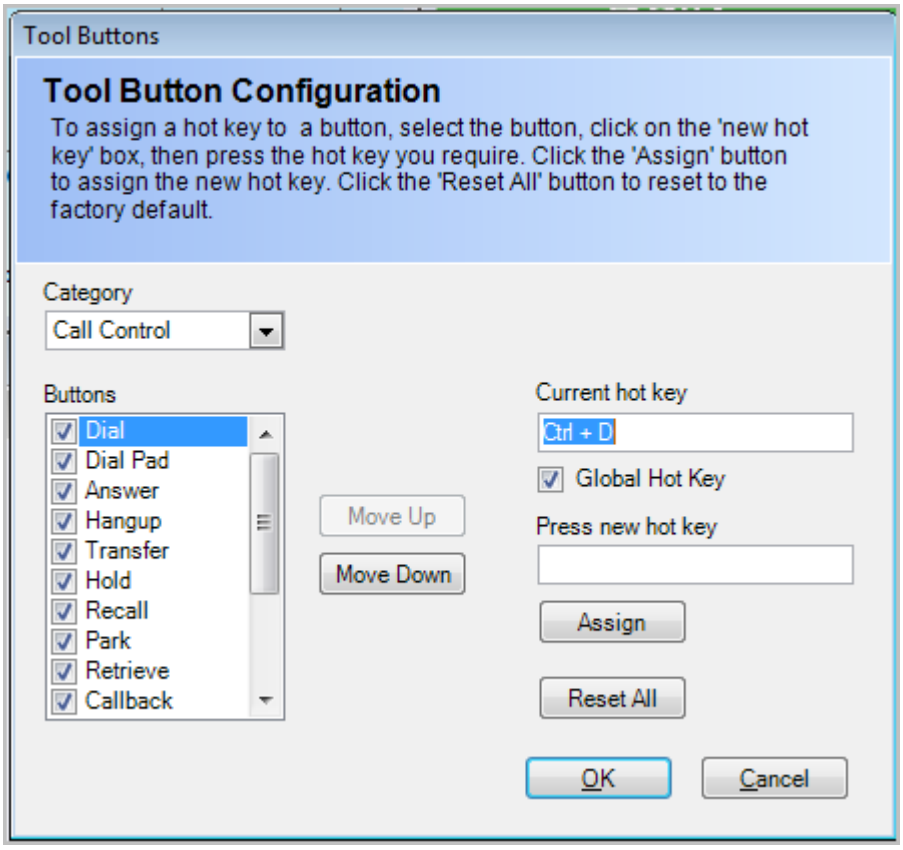
When enabled the quickdial button icon will appear on the screen at all times and can be positioned in any convenient location. In order to dial a required number you will need to locate the application displaying the number to dial, select the number and then press the quickdial button.

Tool Buttons

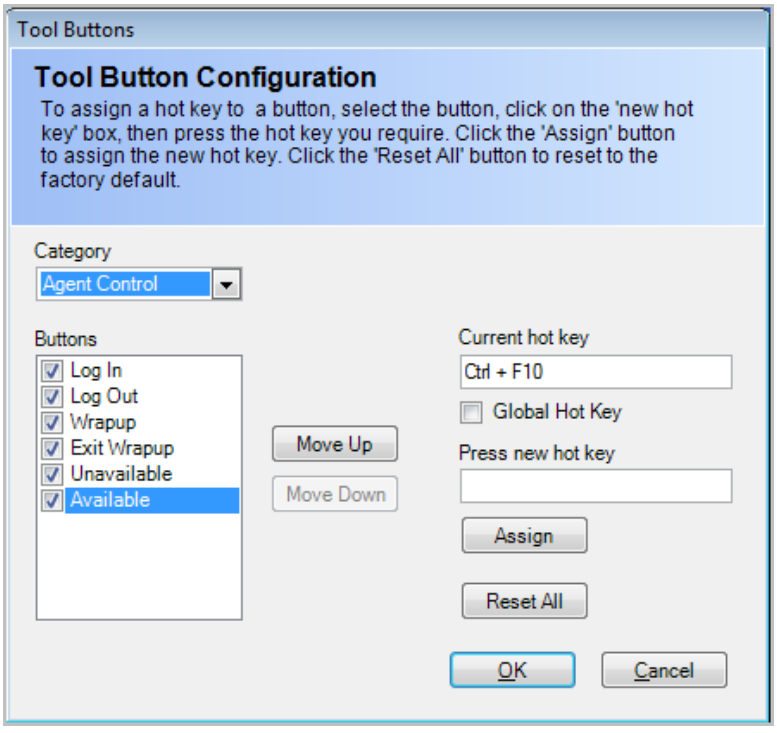
The tool buttons which appear on the call control toolbar are configurable from this option. You can specify which functions are available by checking the appropriate checkbox in the buttons list. Moving the buttons in the list up move the respective icon to the left of the toolbar and moving the button down in the list moves it to the right.

You can also define hot key sequences for each button. There are already default hot keys defined however you change the hot key for a given toolbar button.

How To: Change a hot key assignment
Select the button in the buttons list
Place the cursor into the ‘Press new hot key’ textbox
Press the sequence for the hot key e.g. ctrl alt D
Press the assign button
Your hot key is now assigned



If you are running Agent Control in an ACD environment you can also enable the agent control functions to appear on the toolbar as well. In order to see any agent control buttons you will need to enable Agent Control from the View menu and enable the required buttons from the Tool Button Configuration described above by selecting Agent Control in the Category drop down box (see diagram below).



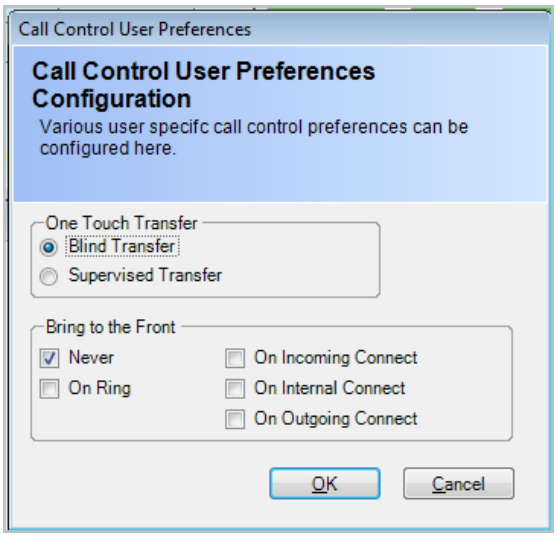
Call Control Preferences

Call control preferences allow you to specify two items. How the transfer is processed when selecting transfer from the user or extension status windows or from a status action button. This can be set to Supervised or Blind.

You can also define when the toolbar becomes visible when a call is triggering a response from the call control system.

The toolbar can be brought to the front in the following conditions:

- Never
- On Ring – when an incoming call rings your extension
- On Incoming Connect – Once an external incoming call has been picked up
- On Internal Connect – Only when internal calls are picked up
- On Outgoing Connect – When an outgoing call is connected

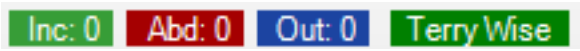


Toolbar status indicators

The toolbar contains a status indicator, mini statistics counts and a screen-pop results indicator.

The status indicator shows the call type and changes colour to indicate this whilst the call is in progress, for example if the default colour scheme is in operation then it would change to green for an incoming call, blue for outgoing etc. The extension being controlled will be displayed; time in the current state e.g. ringing, hold, off-hook ; and the calling number or number dialled

The mini statistics indicator shows the daily total for each of the basic call types; incoming, outgoing and abandoned. To the right of these statistics you can view the current caller or if the caller is not found in the database then ‘No contact found’ will be displayed. If the screen-pop search returns more than one result then ‘Multiple Contacts Found’ will be displayed and again clicking on this will display the screen-pop viewer.



Clicking on the caller name will pop the details for that caller into the MyCalls screen-pop viewer (see the section on screen-pop for more details).

MyCalls Desktop as a standalone product

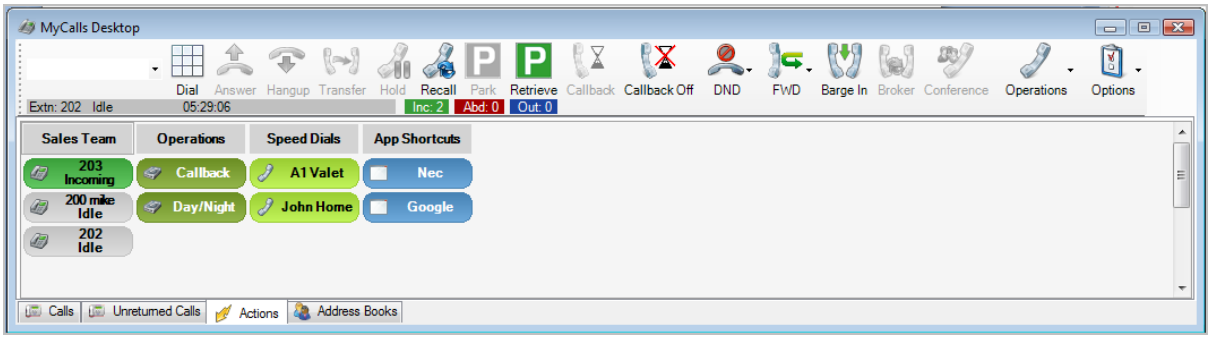
If you are running the MyCalls Desktop standalone product then you will be presented with a different interface to the normal MyCalls with Call Control.

The interface whilst similar to the main MyCalls product lacks the majority of the call management features and focuses only on the features related to operation of a call control desktop application.

The features available are as follows

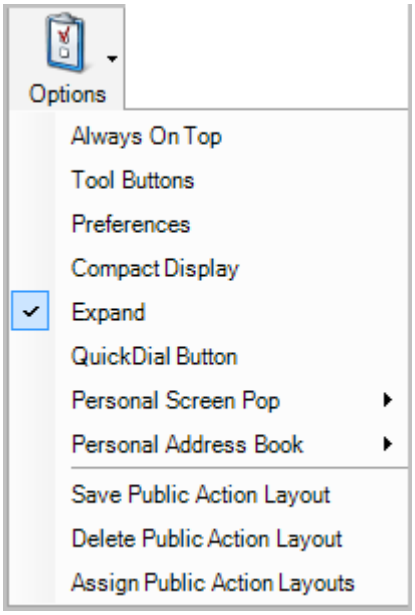
- Call Control Toolbar
- Call Logs
- Unreturned Call Logs
- Actions Panels
- Address Books
- screen-popping

The operations of the above features are as described in the preceding section of this manual. With the desktop only product you can view the interface as toolbar only or by selecting the Expand option from the toolbar options you can view the main panel and status tabs which enable the other features.



The MyCalls Desktop interface

The Toolbar options icon contain some additional options (shown here) which allow configuration of the personal screen-pop settings and personal address book settings. These allow access to the creation of personal screen-pop interfaces and address books as described in the configuration section for the normal MyCalls product.



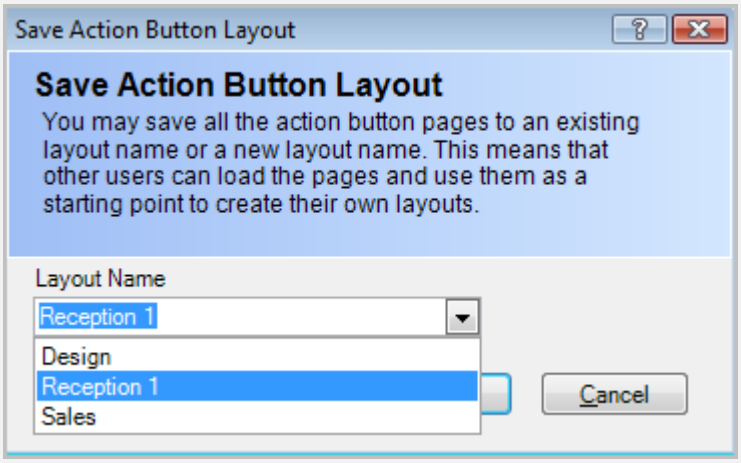
Expand – Desktop only option allows the user to view the call logs, unreturned calls, action screens and address books in addition to the call control toolbar.

Save, Delete and Assign public action layout - Available to Supervisors or PBX administrators. A public action layout contains a complete layout of action buttons. It is available to all users within the organisation.

How To: Create a public actions page

From the toolbar options select 'Select Public Action Layout'

Type in the name of the new layout or select one from the list if any exist. Selecting an existing layout will overwrite that layout with the current layout you have set up

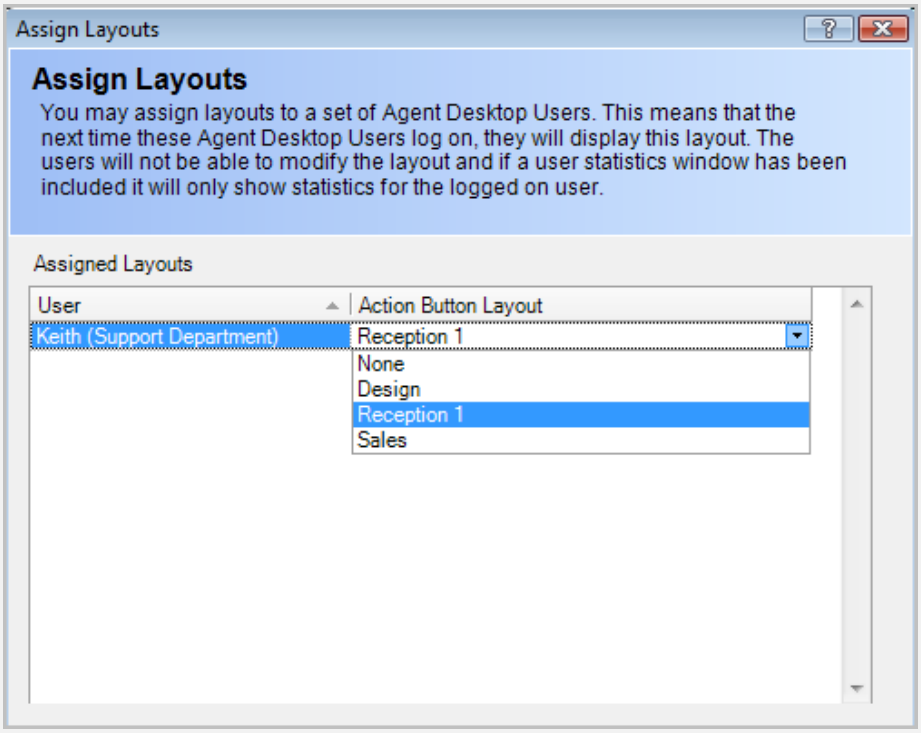

Save Action Button Layout
Save Action Button Layout
You may save all the action button pages to an existing layout name or a new layout name. This means that other users can load the pages and use them as a starting point to create their own layouts.
Layout Name
Reception 1
Design
Reception 1
Sales
Cancel

Click OK

How To: Assign a public layout to an agent desktop user

From the toolbar options select ‘Assign public layout’

From the dialog select the Agent desktop user and from the Action button layout column select the layout you wish to assign to that user.

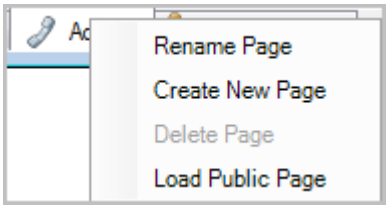

Assign Layouts
Assign Layouts
You may assign layouts to a set of Agent Desktop Users. This means that the next time these Agent Desktop Users log on, they will display this layout. The users will not be able to modify the layout and if a user statistics window has been included it will only show statistics for the logged on user.
Assigned Layouts
User
Action Button Layout
Keith (Support Department)
Reception 1
None
Design
Reception 1
Sales

Click ‘OK’

The assigned agent desktop user can now only use the assigned actions panel(s)

Public action layouts allow you to save your action button layouts and have them assigned to agent desktop users. Alternatively ordinary users can load a predefined public action layout if required.

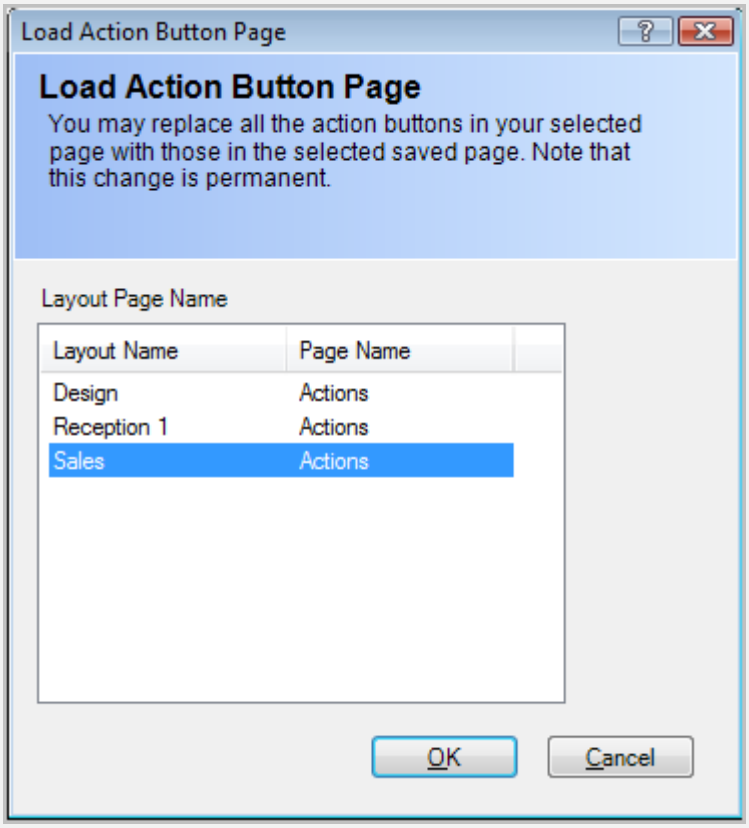
Users can then load these public layouts by right clicking on an action panel. This menu also allows an action panel to be named to something more relevant such as ‘Sales Actions’ or for a new action panel to be created by selecting ‘Create New Page’.



How To: Load a public action panel page into the current action panel

Right click on the actions panel tab

Select Load Public Page



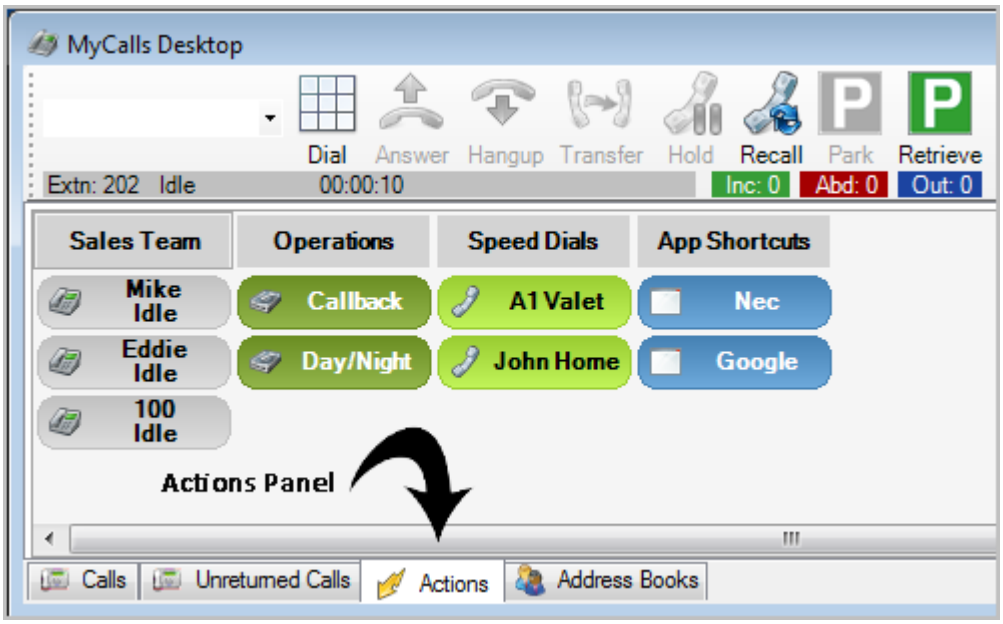
Select a public action panel from the list

Click ‘OK’

The Actions Panel

The actions panel allows you to configure a series of buttons and status indicators to simplify control and monitoring the phone system.

The Actions panels are accessed from the bottom tabbed area just above the status bar. There can be up to 10 actions panels created and each panel can contain up to 100 buttons.



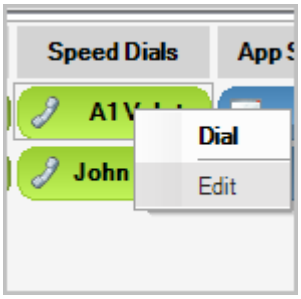
The Actions panel screen provides a grid where the various buttons and status indicators can be placed.

To create more actions panels, right-click on the Actions tab and select 'Create New' from the context menu. You may also 'Rename' and 'Delete' an actions window from the same context menu. There must be at least one Actions panel available therefore you cannot delete the last remaining actions panel and the delete option is disabled in that instance.

The actions panel operates in two modes Normal and Edit Mode. When operating in normal mode the right click context menus will show only the telephony options available whereas in Edit mode you will also see configuration options allowing the configuration of the various buttons.

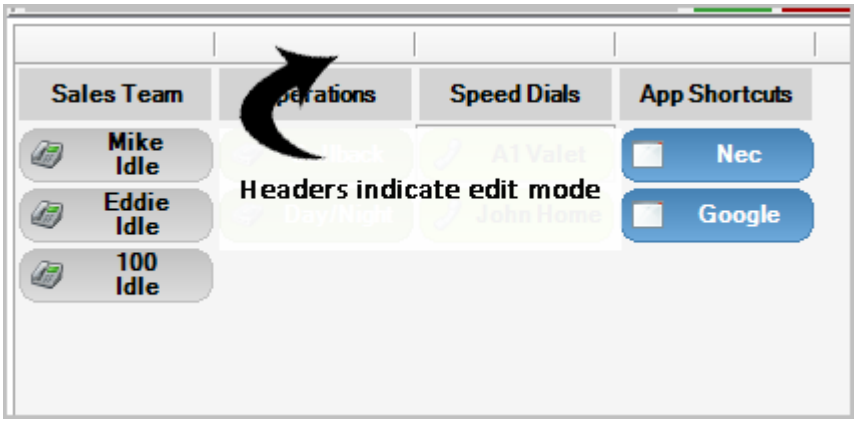
Configuring individual items on the actions panel

By default the actions panel cannot be edited. In order to edit the action buttons on each actions panel you need to right click on the panel (or a button on the panel) and select the edit option.



To exit the edit mode simply right click the actions panel and click 'Edit'

The actions panel appearance will change (a series of header boxes appear along the top of the panel as seen below) and this indicates the various buttons can be created or edited.



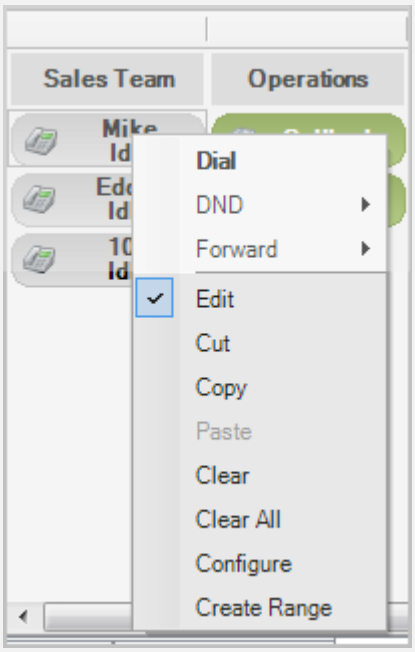
Quick tip:

When in edit mode moving the column headers will allow the size of the buttons to be changed

Once editing has been enabled additional context menu items, accessible by right clicking either a button or a blank area of the action panel, are available.

The configuration requirements of individual items on the actions panel will vary depending on the type of item created. If you right click on a blank area of the panel in a position where you want to create the button and click ‘create’ this will bring up the button configuration dialogue (see ‘Action Button Configuration’).

How To: Place an item or range of items on the actions panel
Right Click on the actions panel and select ‘Edit’ then do one of the following actions
Right click on the position in the actions panel where you want the item to go
Select ‘Configure’ to configure a single item
Select ‘Create Range’ to create more than one item in a block
Select ‘Clear’ to delete a button or ‘Clear All’ to delete all buttons on the panel



How To: Move a button

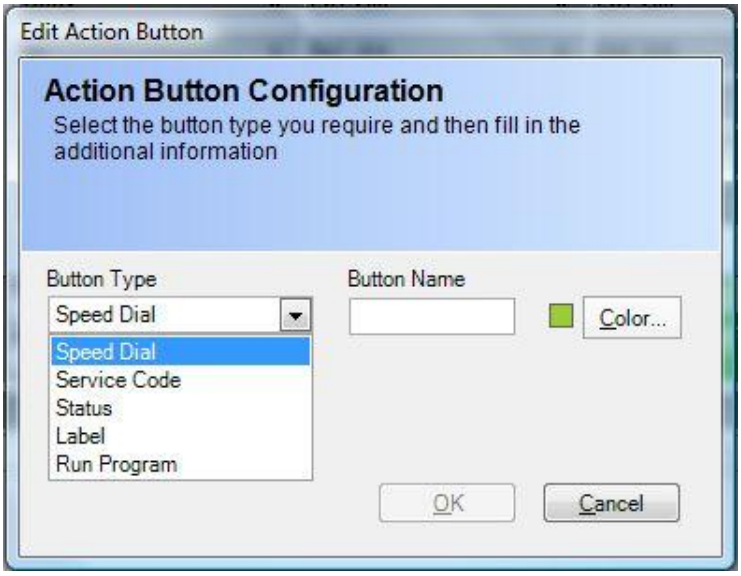
Right Click on the button you want to move

Select ‘Cut’

Move the mouse to where you want the new button to appear

Right Click and select ‘Paste’

Action Button Configuration



Use the Button type drop down menu to select the type of item to create

Items placed on the actions panel can be selected from the following:

- Speed Dial
- Service Code
- Status
- Label
- Run Program

Speed Dials: Allow one click dialling to external and internal numbers. It is not necessary to specify external access digits as these are defined in the call control configuration.

Service Codes: Can be used to perform advanced functions within your telephone system. The service codes available to you will vary dependent on the PBX configuration and generally any available service codes will be automatically imported into MyCalls when the system is installed. There may be exceptions to this and MyCalls allows you to define service codes to suit your requirements as long as they are supported by the telephone system (see service code configuration).

Status indicators: Provide real time indication of the current activity for a specified extension or ACD user.

If displaying user status the user will be associated with an extension when that user logs on to the ACD system (on ACD enabled MyCalls Call Centre systems only), otherwise the user shows as 'Logged Off'. This should not be confused with logging on and off MyCalls Clients at start up.

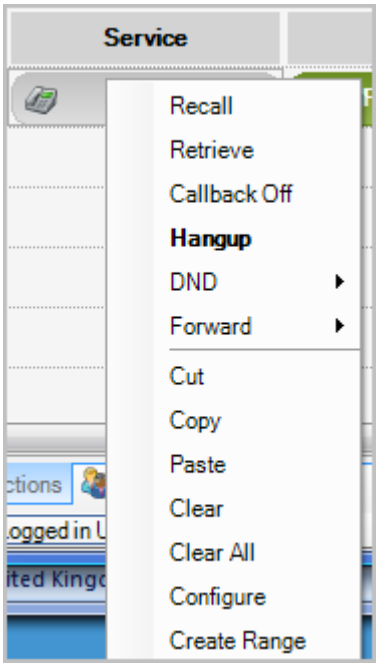
Tracking the status of non ACD users and extensions is accomplished through extension status buttons only.

Both speed-dial buttons and status buttons permit you to dial out. Speed-dials can be associated with any number external or internal. Status buttons can only be associated with internal extensions or in a multi-PBX network any other extension on that network.

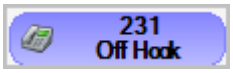
If you configure a Status button associated with your controlled extension then you will have a selection of other functions available. These additional functions reflect the call control toolbar and will change according to the current state of your extension. To access these other functions right-click the status button for your controlled extension. You will see the context menu is split into telephony functions and more general configuration functions.

The telephony functions can include:

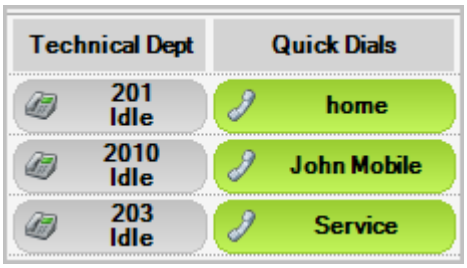
- Answer
- Hold
- Park
- Hold/Recall
- Retrieve



Status buttons also provide instant feedback on the state of any given extension or user. The states which can be shown are detailed in the following table.

Button State	Description	Indication
Idle	The extension is not in use	
Off Hook	The extension is in use but not dialling or receiving an incoming call	
Ringing	The extension is ringing due to incoming call	
Connected - Outgoing	External outgoing call in progress	
Connected – Incoming	External incoming call in progress	
Connected - Internal	Internal call in progress	
On Hold	Extension is in hold state	
ACD unavailable	The ACD user is unavailable	
ACD Wrap up	The ACD user is in wrap-up	
DND	The extension is in DND mode	
Forward	The extension is in forward mode	

Labels: Provide simple visual labels to help when you are arranging the actions panel as in the example shown below.



Run Program: Allows you to set up a button to run an application directly from your actions panel. This can simply invoke an application or you can add a parameter to the application e.g. a filename.

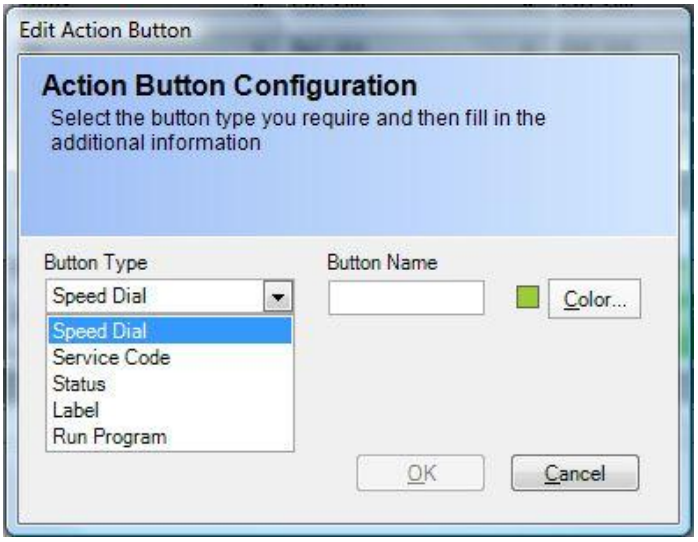
Typical uses of this might include;

- Providing a link to a route mapping website so you can advise on directions
- Having a link to your email application or website
- Link to a price list or range of product brochure documents

Creating an action button

Before you can configure an action button you must first put the action panel into edit mode by right clicking on the action panel and selecting 'Edit'.

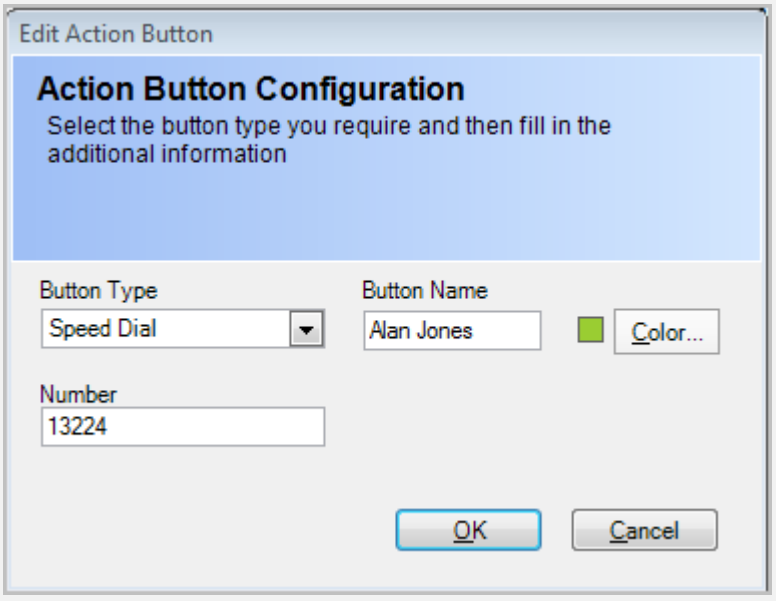
Creation of an action button is accomplished through right clicking the actions panel and selecting configure from the context menu. This will bring up the action button configuration dialog.



See the how-to sections below for more details on configuring the various action button types.

How To: Create a Speed-Dial button

Select the 'Speed Dial' option as the button type



Enter a button name – This will appear as label identifier on the button face

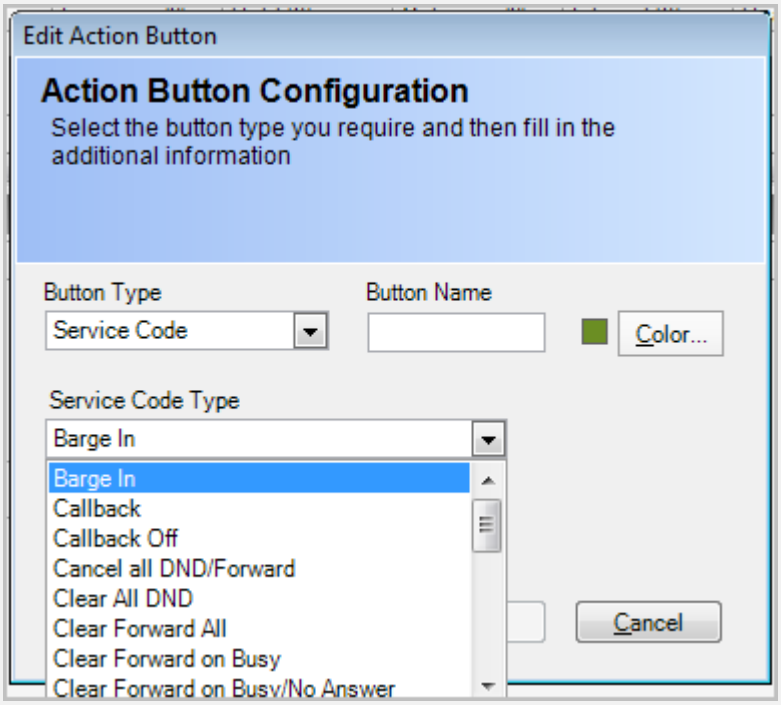
Select a colour if required

Enter the number to dial – ignore any line access codes

Click ‘OK’

How To: Create a Service-Code button

Select the ‘Service Code’ option as the button type



Enter a button name

Select a colour if required

Select the required service code from the list of service code types

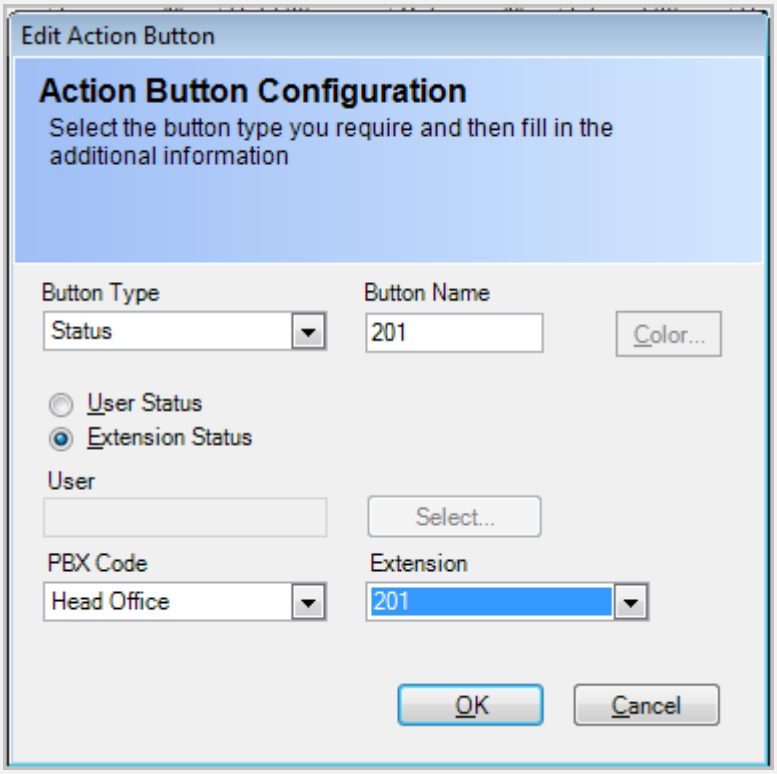
Enter any additional parameters if required such as extension

Click ‘OK’

NB: Service codes have to be created or imported into the application. Creation of service codes would be carried out by the PBX administrator.

How To: Create a Status button

Select the ‘Status’ option as the button type



Enter a button name

Select a colour if required

Specify whether the button will show an extension status or a user status

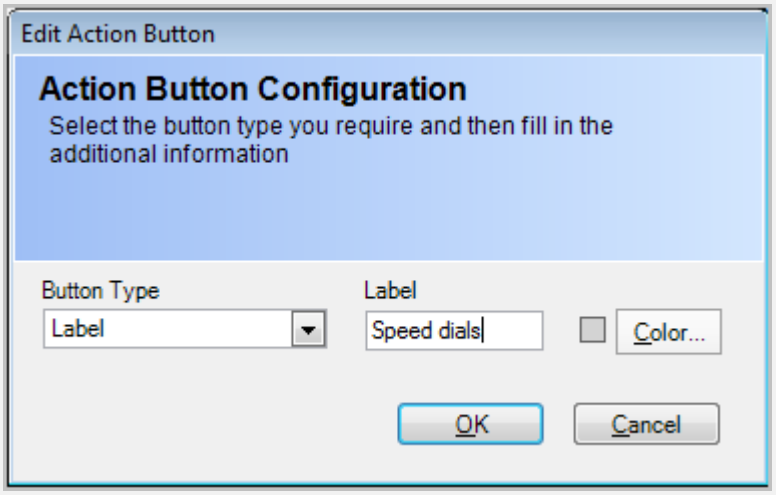
If ‘User Status’ is selected specify the user via the user selection button

If Extension status is selected specify the PBX and Extension number

Click ‘OK’

How To: Create a Label

Labels are used to identify columns, rows or blocks of items created on the action panel and can be placed anywhere on the panel. Labels provide no interactive functionality and only act as visual indicators.



Select the 'Label' option as the button type

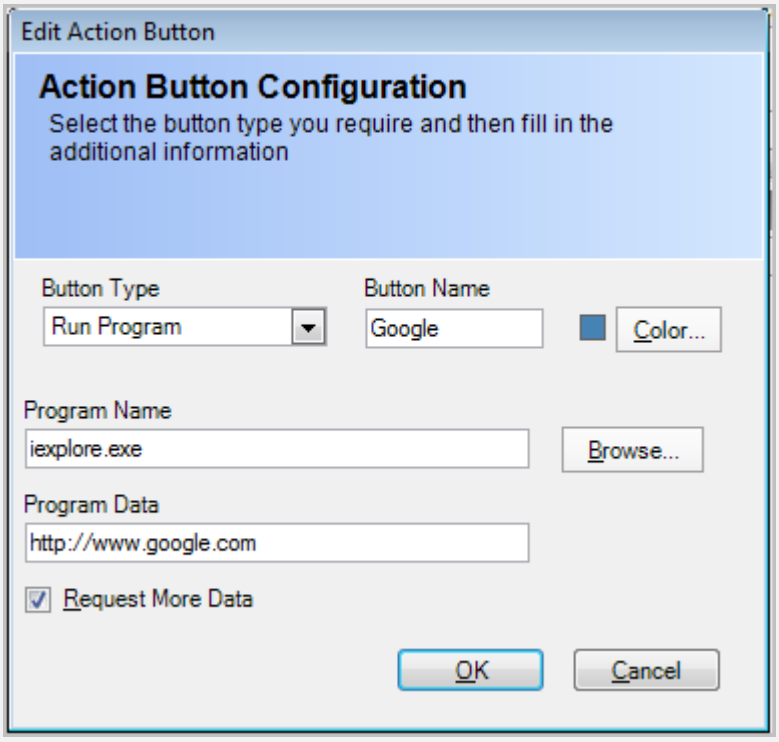
Enter a label name

Select a colour if required

Click 'OK'

How To: Create a Run-Program button

Run Program allows an external application to be invoked from the actions panel. For example you could invoke Microsoft Word and bring up a specific document.



Select the 'Run-Program' option as the button type

Enter a Button name

Select a colour if required

Enter or browse for the program to be invoked

Enter any optional program data such as the filename. This must be a complete path e.g. c:\mydata.doc

Optionally select the request extra data' option. This will pop up a dialogue when the button is pressed to prompt the user for additional information such as a filename.

Click 'OK'

Creating Ranges of Action buttons

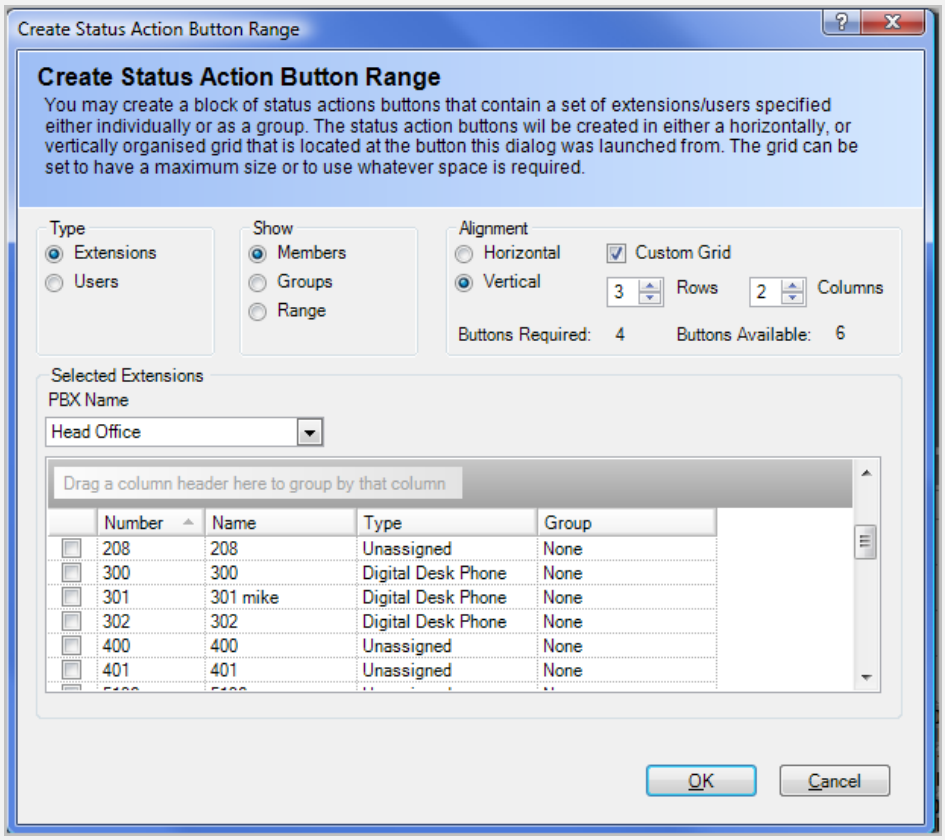
In many situations you will want to create a range of buttons for a range of extensions or users etc. You can display a range of Extensions or Users and these can be selected individually or from a specified group. If extensions are to be displayed then you also have the option to display a range of extensions starting from a given extension number.

When specifying a range of buttons you have the option of specifying a block running from left to right (Horizontal) or from top to bottom (Vertical). You can also specify the number of rows and columns to use. When specifying a custom block the number of buttons required to display your

selected range of values will be shown and if the block is not large enough to show all the values this will be indicated in red.

How To: Create a range of Action buttons

Right click in the grid at the position you wish the block of buttons to appear and select 'Create Range'


Create Status Action Button Range
Create Status Action Button Range
You may create a block of status actions buttons that contain a set of extensions/users specified either individually or as a group. The status action buttons wil be created in either a horizontally, or vertically organised grid that is located at the button this dialog was launched from. The grid can be set to have a maximum size or to use whatever space is required.
Type
Extensions
Users
Show
Members
Groups
Range
Alignment
Horizontal
Vertical
Custom Grid
3
Rows
2
Columns
Buttons Required: 4
Buttons Available: 6
Selected Extensions
PBX Name
Head Office
Drag a column header here to group by that column
Number
Name
Type
Group
208 208 Unassigned None
300 300 Digital Desk Phone None
301 301 mike Digital Desk Phone None
302 302 Digital Desk Phone None
400 400 Unassigned None
401 401 Unassigned None
OK
Cancel

From the Dialog box:

Select the type Extensions or Users

Select Members, Groups or Range (Extensions type only)

From the resulting list either select the required Extensions/Users, the Group or specify a range.

If specifying a range select the PBX and select the start extension followed by the number of extensions required

For the Alignment, specify horizontal or vertical and optionally select a custom grid specifying the number of rows/columns required.

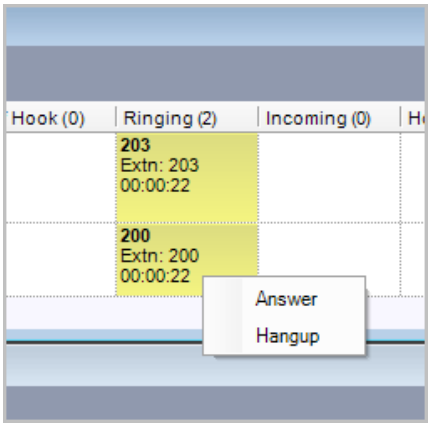
Click 'OK'

Using Call Control functions from other MyCalls windows

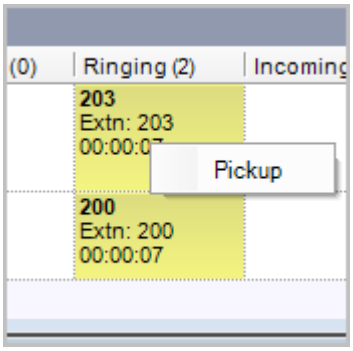
Call Control functions are also available from status and call log windows. Real time status windows can be configured to display extensions activity.

Using Call Control with Real Time Status windows

If you have real time status enabled then you can access call control functions directly by right clicking the extension in the status window. If the extension is the one you are controlling then right clicking that extension gives you all the core telephony functions such as answer, hang-up, hold etc. The exact functions will depend on the state of the extension at the time. For example if your extension is ringing then you can answer or hang-up the call.



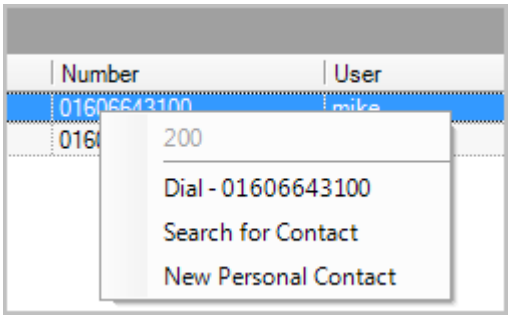
If the extension is not the one you are controlling then you can carry out operations such as dialling that extension, pick up a call ringing on it, set call-back on that extension etc.



Using Call Control with the Call Log window

The Call Log and Unreturned Calls Log windows offer the facility to right click and dial. Simply point the mouse over the record in the list and right click. You can then select dial for the required number from the context menu.

This context menu also allows you to search and popup the contact details or adds a new personal contact for that caller if one does not exist.



Call Control configuration

Prior to configuring MyCalls call-control you will need to install a TAPI service provider driver. This can be installed on the MyCalls server or any other server on the network.

Call control is configured on a per PBX basis so if several PBX's are configured then a call control configuration will be needed for each. Configuration of call control requires that you specify a TAPI server and associated information such as external dialling digits, minimum number of extension digits and a list of exceptional numbers e.g. 999

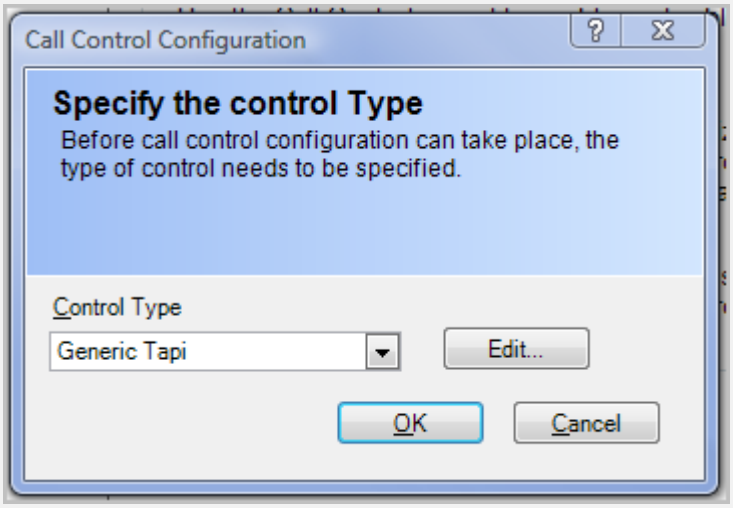
How To: Configure the Call Control Server

From the menu select Configure->Telephone System->PBX->Call Control

Select 'Configure Call Control'

Select the required control type protocol. This will normally be 'Generic TAPI'

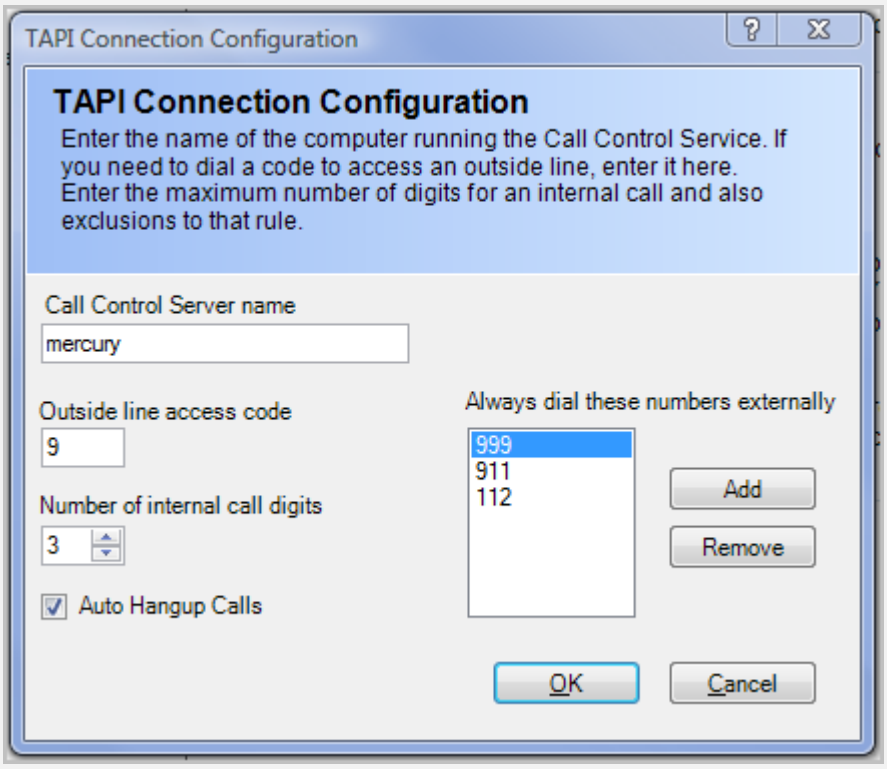
Click 'Edit'



From the resulting dialog box enter the name of the PC hosting the TAPI server

Enter the other values or outside Line Access, Number of digits representing an internal call and add any require special numbers to be dialled externally regardless of number of digits such as emergency numbers 112, 999 etc.

You may select to auto hang-up calls when the call is complete.


TAPI Connection Configuration
TAPI Connection Configuration
Enter the name of the computer running the Call Control Service. If you need to dial a code to access an outside line, enter it here. Enter the maximum number of digits for an internal call and also exclusions to that rule.
Call Control Server name
mercury
Outside line access code
9
Number of internal call digits
3
Auto Hangup Calls
Always dial these numbers externally
999
911
112
Add
Remove
OK
Cancel

Click 'OK'

NB: when you enter a number whose total digits are less than or equal to the maximum number of digits specified for internal calls the call will be treated as an internal call and line access codes are not added, with the exception of the ones specified in the list which are always treated as externally dialled calls.

Call Control Groups.

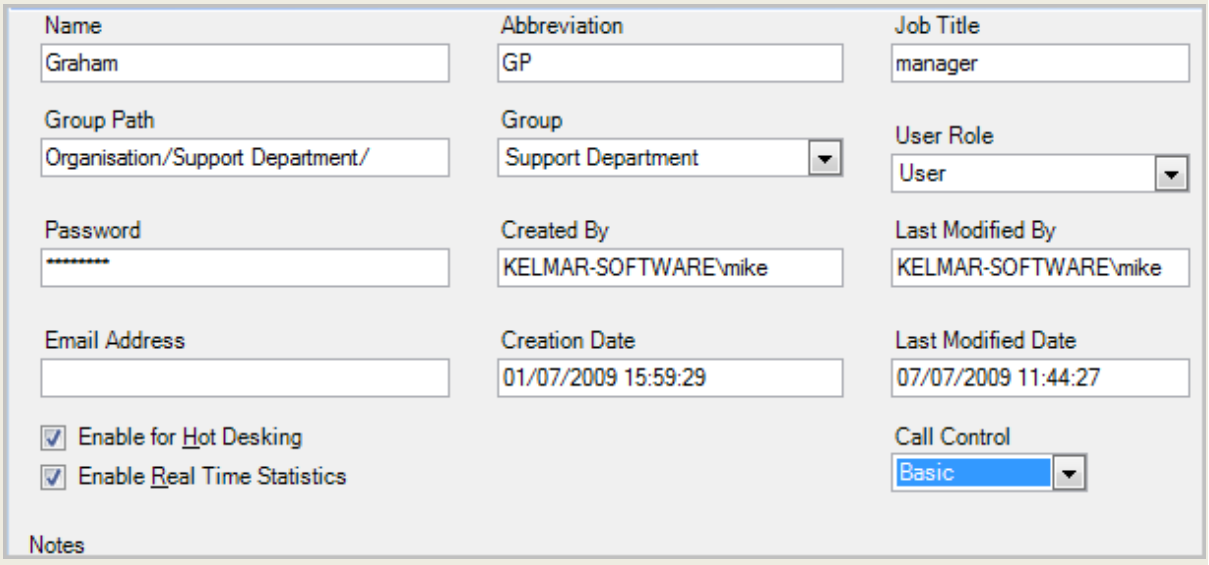
Creating a call control group requires you to configure your users so that they have call control capabilities. This is done as part of the user configuration. When creating or editing a user simply select the 'Call Control' drop down option for that user and set it to basic. This means when the user logs on they will be given the option to control an extension.

A Call control group defines what its members can do with regard to call control. The functions which may be assigned to a group of call control users are as follows;

- Answer Calls
- Make Calls
- Pickup a call ringing on another extension
- Allow Call Forwarding
- Allow Do Not Disturb (DND)
- Allow Operator Functions (see operator section)
- Allow Barge In

Typically you would create groups for different types of users. For example reception staff may need to access all functions including call brokering, parking calls, conferencing etc whereas sales agents

May only need to answer, make and transfer calls from the screen. By putting users into groups several users can have their call control environment defined from one configuration screen. A user can only belong to one call control group.



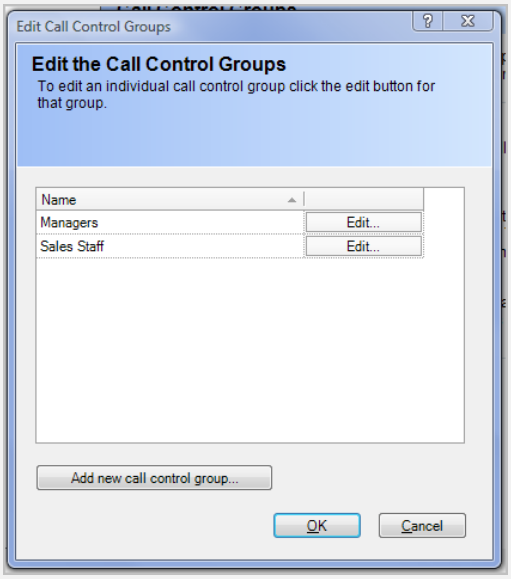
Call Control User Settings

How To: Configure a Call Control group

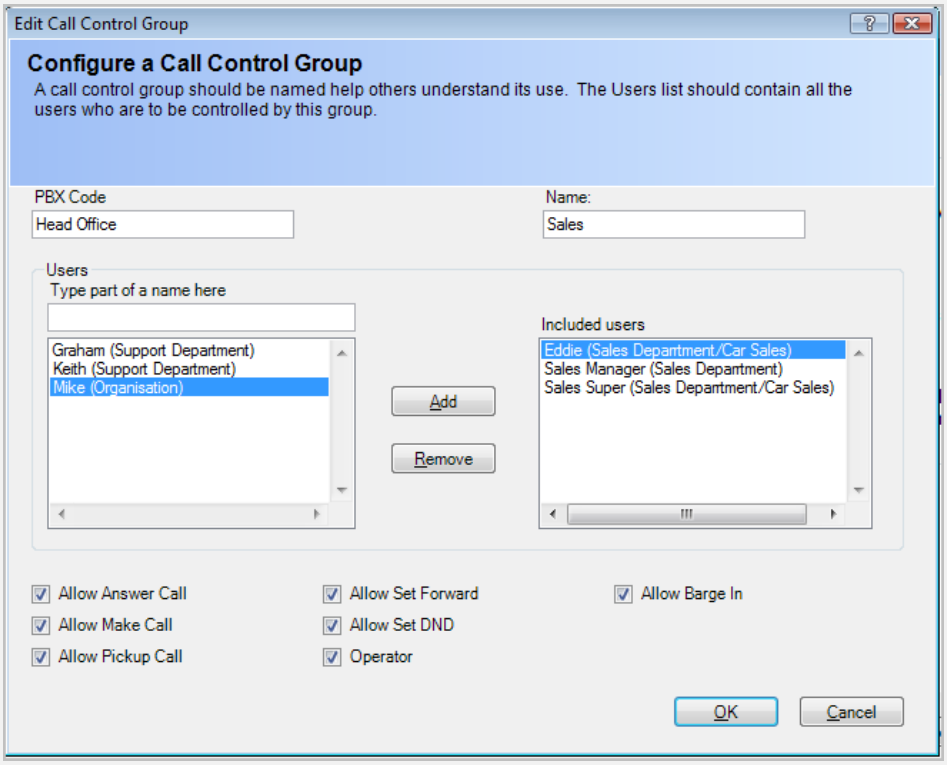
From the main menu Configure-> Telephone System->PBX->Call Control

Select 'Create or Edit a call control group'

Either click 'Add a new call control group' or if an existing group is already configured you may edit the group by clicking the 'Edit' option displayed alongside the group name



In the dialogue you may specify a group name and add users to the group by specifying the user name, selecting the user(s) and clicking the 'Add' button. Only users enabled for call control will be available in the Users list.



To remove a user from the group; select the user from the included users box and click 'Remove'

Specify the call control functions which can be assigned to this group of users by checking the appropriate box e.g. Allow Answer Calls, Allow Make Calls, etc

Click ‘OK’

Operator Functions

Setting members of a call control group as operators gives them special privileges to carry out operations other than the extension they are currently controlling. These privileges are intended for use by reception operators where they may need to forward calls from an extension or set DND modes on other extensions.

The operations which an operator can control on other extensions are:

Set Forward

Set DND

This allows operators to carry out forwarding and DND on extensions on behalf of the users or if an extension is known to be unavailable due to meetings or the user being out of the office.

Service Code Configuration

Service codes can be configured by importing from the switch using the config import utility. This utility is only available to switch maintainers and details of this can be found in the installer manual. Alternatively a PBX admin user can manually add a service code.

A service code consists of the code itself usually a 3 or 4 digit number and this can, depending on the service code's functionality, be associated with data values.

The service codes when activated are sent via a network connection to s service code port on the switch. If required, the data value, or in some cases multiple data values, can be sent before the service code itself is sent to the switch or after the service code is sent. The service code configuration dialog allows up to two data values to be defined as shown below.

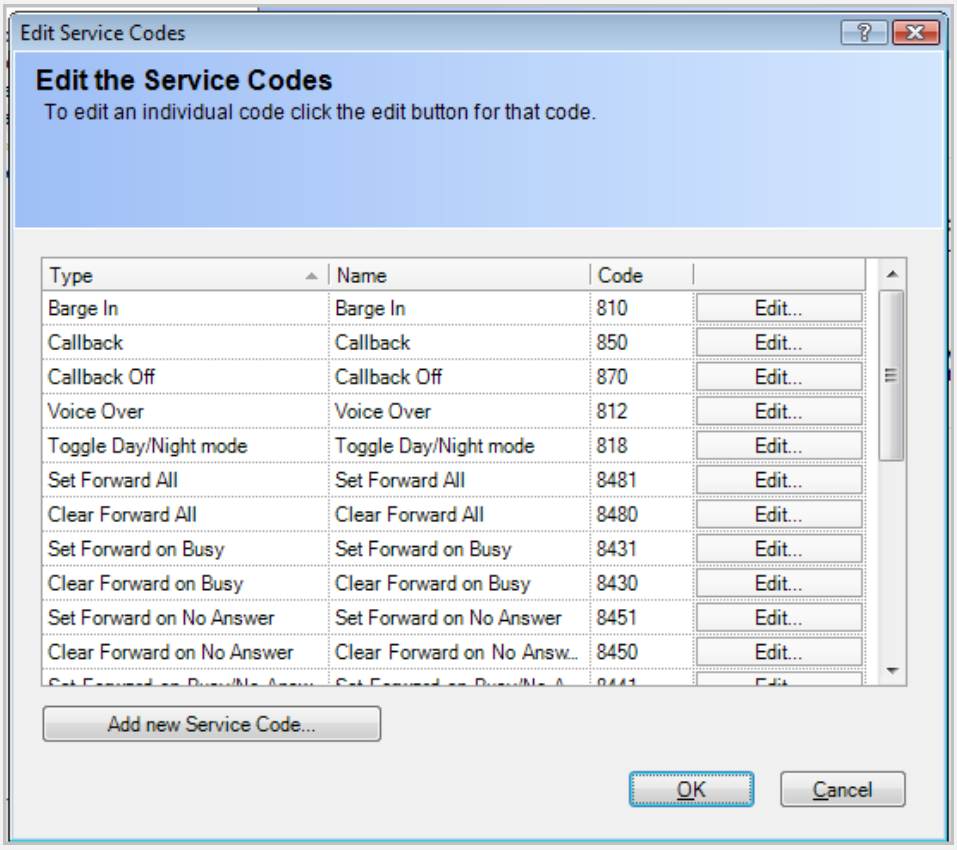
How To: Add or Edit a service code entry

Select Configure->Telephone System->PBX->Call Control from the menu

Select Service Codes

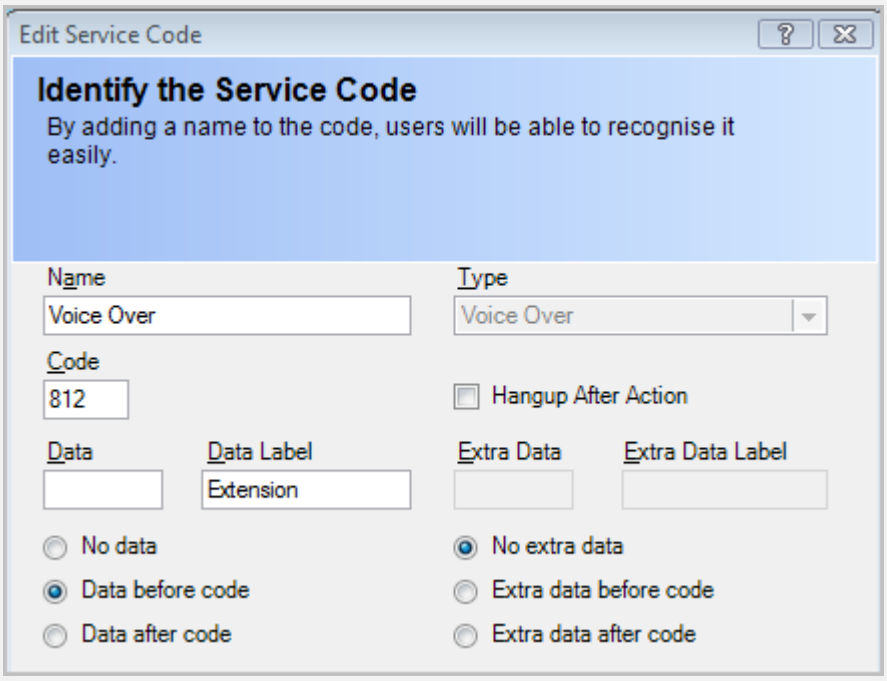
Select 'Create or Edit service codes'

If the service you require is already in the list select the associated 'Edit' button, alternatively select 'Add a new Service Code'



In the Service Code dialog specify the Name and the service code value

Specify and data values and select whether to send these values before or after the service code value.


Edit Service Code
Identify the Service Code
By adding a name to the code, users will be able to recognise it easily.
Name
Voice Over
Type
Voice Over
Code
812
Hangup After Action
Data
Data Label
Extension
Extra Data
Extra Data Label
No data
Data before code
Data after code
No extra data
Extra data before code
Extra data after code

Click 'OK'

Chapter 11

Screen-Pop

MyCalls provides a screen-pop capability so that incoming and outgoing calls can be identified by matching the calling number to possible entries in a personal contact manager or corporate database. The system can be configured to search multiple databases and contact lists and these can be a mixture of personal data and system wide data.

The main difference between a personal and a system database is that personal data is managed by each user on the system whereas a system database would be managed by the system administrator.

Screen-pop groups

Because contacts are likely to call your company for different reasons users within your organisation can be set up to search databases appropriate to their job function. For example accounts staff would want to search for contacts in the accounts data whereas sales staff would want to search in the sales contact data. This can be accommodated by setting up different screen-pop groups depending on the function of the members of the group. This is dealt with in more detail in the screen-pop configuration section.

Quick tip:

Dependent on the database employed you may need to have a copy of the application e.g. Act! Outlook etc installed and running on your PC before you are able to show the contact data.

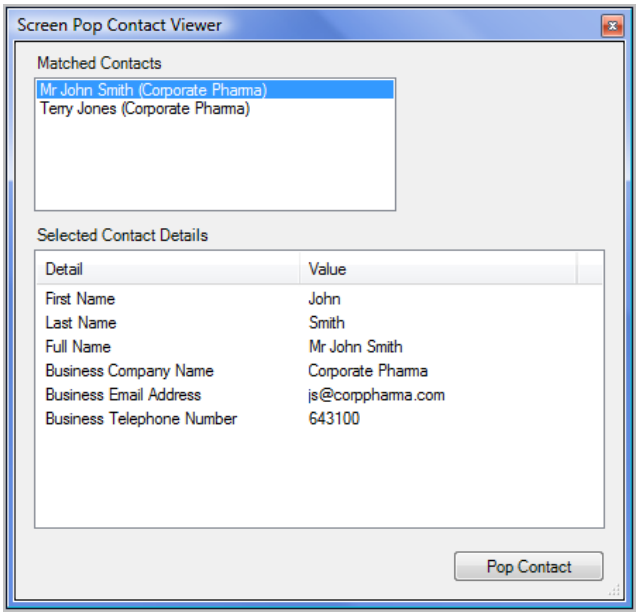
The Screen-pop sequence

If you have screen-pop installed and configured then you will be ready to use the screen-pop system. The screen-pop operates in a specific sequence depending on whether the call is incoming or outgoing and also dependent on the configuration of the screen-pop.

Incoming calls

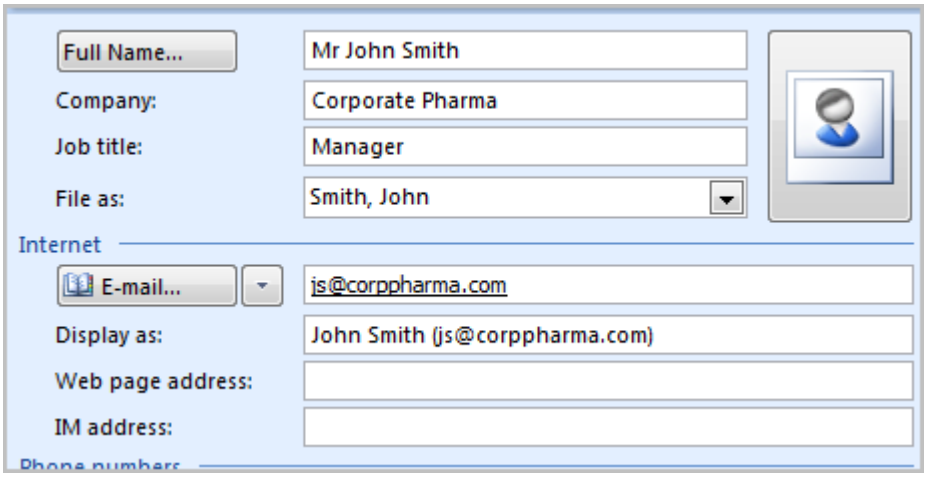
Initially the system will detect an incoming call ringing on an extension. Once the system detects the caller's number (CLI) for the call the client associated with that extension will pop up a contact window. The popup window will either indicate a single result for the incoming call in which case the basic details for the caller are displayed, or if multiple contacts share the same CLI then a list of several contacts may appear. The user can select any one of the contacts and inspect the contact details prior to answering the call or whilst the call is in progress.

The screen-pop viewer



The screen-pop viewer appears when the CLI or OLI for a call is matched to a number in the contact database(s). The viewer shows information regarding the caller and the actual fields shown can be configured from a list of available fields held within the CRM or contact database.

The viewer gives the option to pop the complete contact details in the actual application where the contact was found, for example if the contact was found in a personal contact list such as outlook then the outlook application will be invoked and the appropriate record displayed as shown in the example below.



Once the call has been completed the screen –pop viewer can either automatically close or be set to allow you to close it manually. Incoming calls can pop the contact viewer when the call rings your extension or when the call is actually answered and this behaviour can be set for each screen-pop group.

Outgoing calls

The sequence is the same as for incoming calls except that the screen-pop viewer will not appear until the call is answered.

screen-pop configuration

A link to an external database is created when you configure that database for use within MyCalls. Such a link called a screen-pop interface and you can configure one or more interfaces into your MyCalls system. MyCalls supports interfaces to a variety of industry standard database products including;

- Sage Accounting
- Act
- Maximizer
- Goldmine
- Microsoft Outlook

Whilst each supported product operates in a different way the configuration of the MyCalls screen-pop is very similar for each. This makes the configuration of the database interfaces very similar irrespective of the actual database itself. MyCalls presents a uniform set of dialogues for all the supported interfaces. Configuration of the Interfaces requires the following steps:

- Add the interface to the list of configurations
- Specify the connection properties – in some cases this will be selecting a folder in others it may require login details, passwords etc.
- Specify which fields contain phone numbers for searching
- Decide which fields you want to see in the screen-pop viewer
- Specify the format(s) of telephone numbers stored in the database
- Determine if the database contains companies, contacts, or both and decide which of these you want to search.

Once configured the screen-pop system will automatically search any interfaces you have configured. If you have configured multiple interfaces you can prioritise the order in which they are searched.

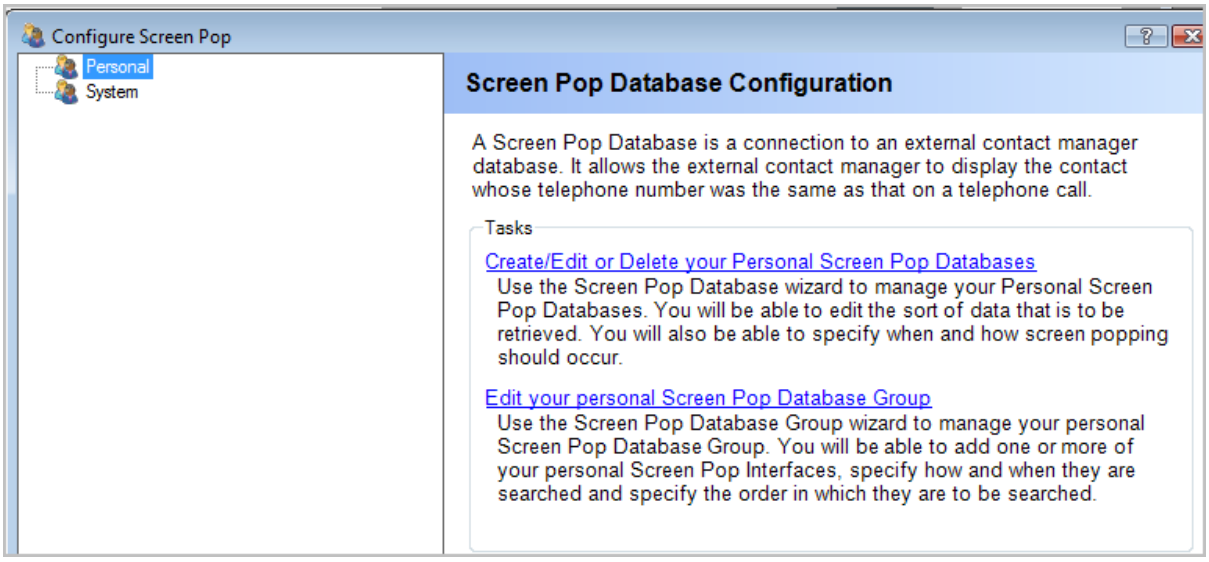
MyCalls supports the concept of personal and system interfaces. A personal interface would be configured on an individual PC client and would only be able to view details of contacts local to that user. The individual owner of the personal interface(s) can configure that interface to suit their own requirements.

A system interface allows a pbx administrator to configure an interface which can be accessed by multiple users. Multiple system interfaces can be configured and these can be accessed by different groups. As an example a CRM database could be configured so it can be accessed by the sales department, in addition an accounts database could also be configured to be accessed by the accounts department.

Configuring Personal screen-pop databases

Personal screen-pop interfaces can be configured individually for each MyCalls user. Whilst any database can be defined as a 'personal' interface they are usually reserved for applications such as a local MS-Outlook or similar contact management application where the data is stored on a specific PC rather than a central server.

Selecting Configure->screen-pop from the main menu will display the screen-pop configuration screen.


Configure Screen Pop
Personal
System
Screen Pop Database Configuration
A Screen Pop Database is a connection to an external contact manager database. It allows the external contact manager to display the contact whose telephone number was the same as that on a telephone call.
Tasks
Create/Edit or Delete your Personal Screen Pop Databases
Use the Screen Pop Database wizard to manage your Personal Screen Pop Databases. You will be able to edit the sort of data that is to be retrieved. You will also be able to specify when and how screen popping should occur.
Edit your personal Screen Pop Database Group
Use the Screen Pop Database Group wizard to manage your personal Screen Pop Database Group. You will be able to add one or more of your personal Screen Pop Interfaces, specify how and when they are searched and specify the order in which they are to be searched.

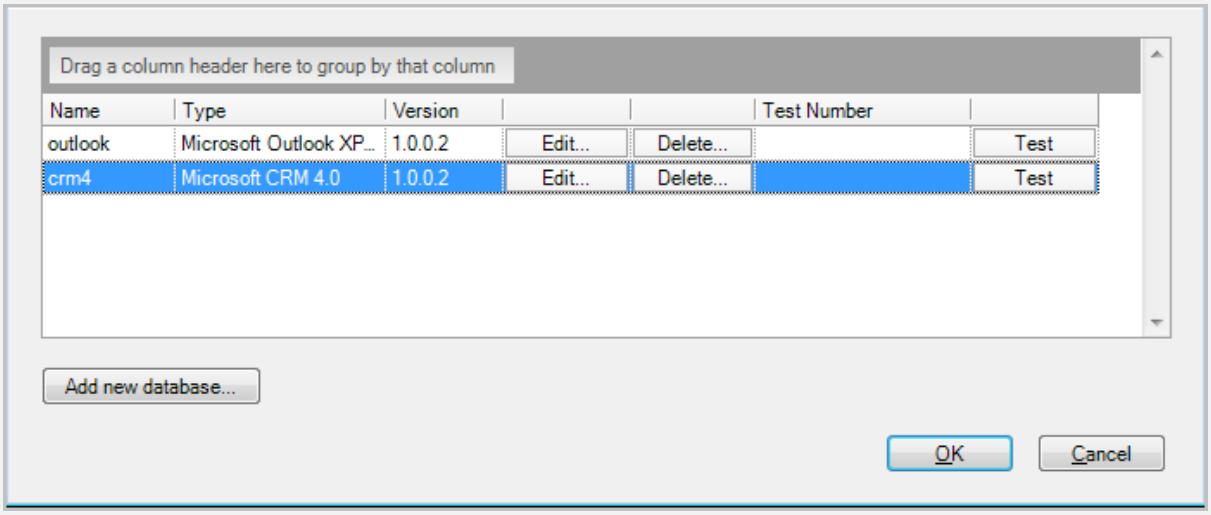
For a personal screen-pop you need to configure the screen-pop databases and the screen-pop groups which define permissions for each database in your list.

How To: set up a personal screen-pop interface

Select Configure->screen-pop->Personal screen-pop from the menu.

Select Create/Edit screen-pop

The screen will show your currently configured interfaces.

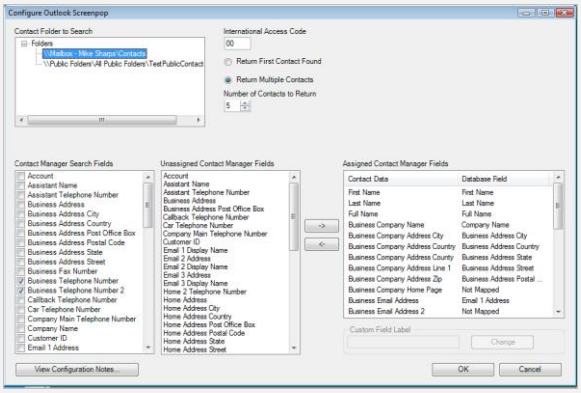


Click ‘Add new database’

Name the screen-pop interface and select the application e.g. Outlook, from the list

Click ‘OK’

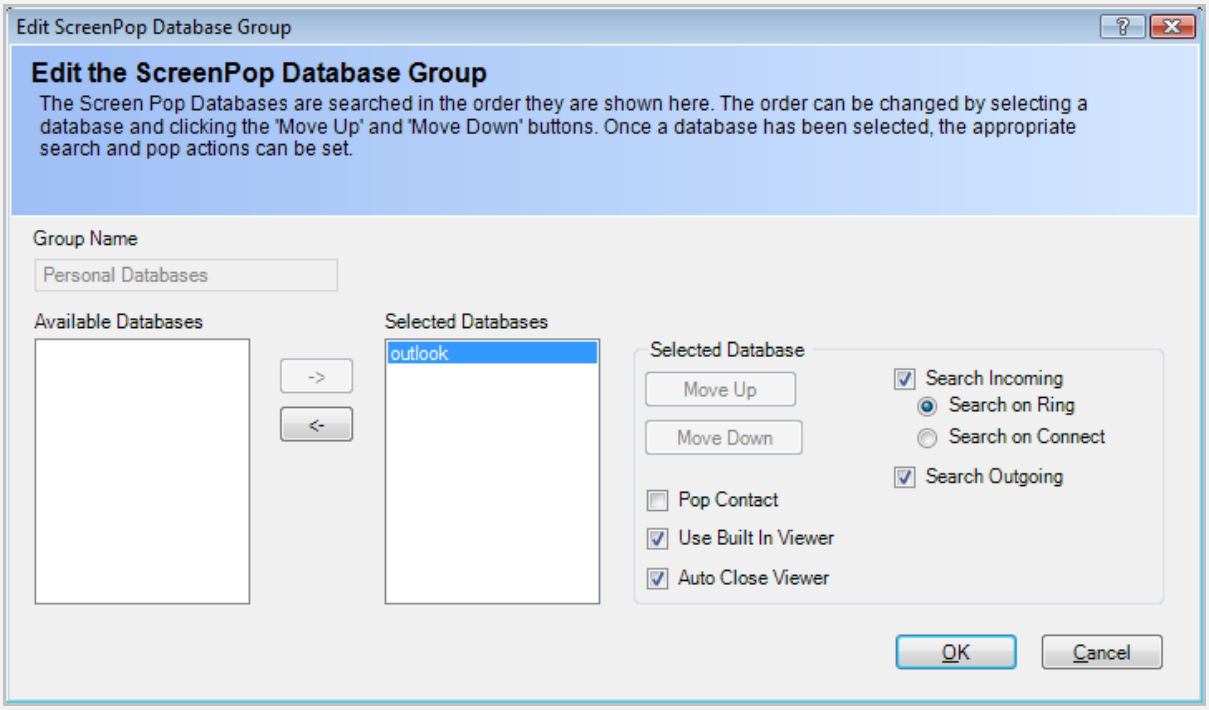
The resulting dialog box presents a number of configuration areas specific to your interface. Each of the areas are similar between different contact databases (though not all identical) and the configuration is described below (see screen-pop interface dialogue box)



Having configured the screen-pop interface and mappings you then need to configure a personal screen-pop group. This allows you to set up your personal database group.

Click ‘OK’

Click ‘Edit your personal screen-pop group’


Edit ScreenPop Database Group
Edit the ScreenPop Database Group
The Screen Pop Databases are searched in the order they are shown here. The order can be changed by selecting a database and clicking the 'Move Up' and 'Move Down' buttons. Once a database has been selected, the appropriate search and pop actions can be set.
Group Name
Personal Databases
Available Databases
Selected Databases
outlook
->
<-
Selected Database
Move Up
Move Down
Search Incoming
Search on Ring
Search on Connect
Search Outgoing
Pop Contact
Use Built In Viewer
Auto Close Viewer
OK
Cancel

Select a screen-pop interface from the available Databases box and click the [->] button

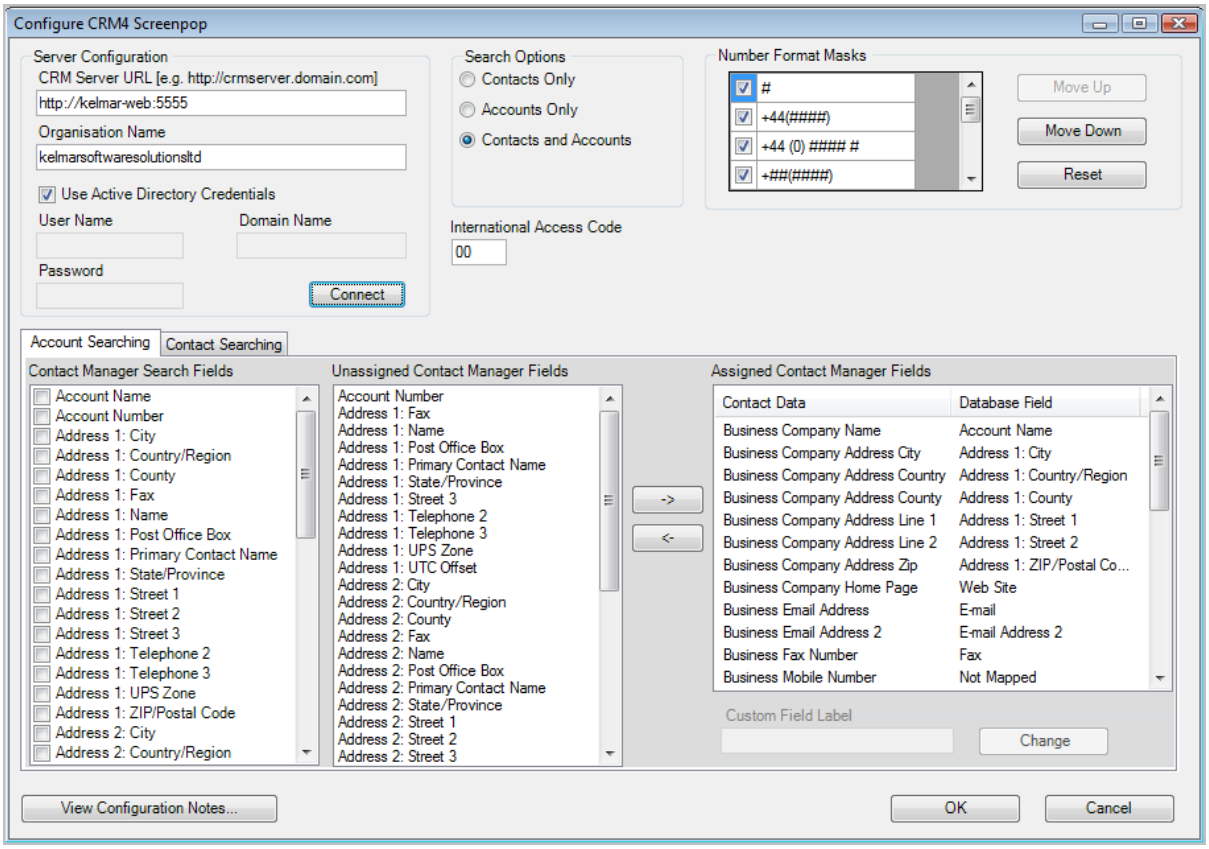
This adds the interface to the Selected Databases box

Repeat for each of the databases configured

Select each of the selected databases in turn (in the Selected Databases box) and then select the properties for the interface e.g. pop on incoming/outgoing etc.

The screen-pop interface dialog box

This dialog is split into several areas. An example shown below is for Microsoft CRM but each database application will have its own configuration screen. Refer to the 3rd party configuration guide for details.



Server Configuration/Data Folder: Specify the data location, Contact folder, Catalogue or Database name for the interface. In some cases this will be a database name and in other it may be a path to a data file or network share.

Username and Password: In some cases a username and password is required. This is specific to the database or contact manager application being employed.

Search Option: Search Contacts, Accounts or both

Return single or multiple contacts: For larger databases you may wish to only return the first contact found or limit the number of contacts found to increase performance of the screen-pop search.

Number Masks: Depending on the CRM or contact manager application numbers to be searched may be stored in various formats. The number masks allow you to specify number formats which can be searched on. For example a format such as #### ##### would search for a sequence of 4 digits followed by a space character followed by 5 digits. Excessive need for number formats can cause the search process to slow down considerably.

Number format examples

Format	Example	Description
#	01342559561	Any number of digits, no spaces
##-###-####	01-800-3456	Digits separated by – symbol
+##(#####)#	+44(1606)541237	International + with parentheses in the number

Search Fields: Lists the fields in the contact database which could potentially contain telephone numbers. These are the fields which the screen-pop will search in order to match the target call. The fewer fields searched the faster the search will be.

Assigning fields for the screen-pop viewer: The Unassigned Contact Manager fields list shows all the fields in the target database which have not been assigned to the screen-pop viewer. These fields will not be shown when the call is shown in the viewer.

The Assigned Contact Manager dialogue contains two lists, on the left there is the contact data list, containing the available MyCalls call viewer fields. These consist of twenty one fixed and ten custom fields. The fixed fields include Name, Address, telephone, notes, record ID etc. The custom fields are freeform fields which you can use to display application data as required e.g. credit limit or account status.

The right hand list 'Database Field' lists the fields from the CRM or Contact manager database. These can be assigned to one of the internal contact viewer fields. It is likely that the 3rd party database will contain many more fields than those available for the viewer, therefore any fields not assigned to the viewer are marked as 'not mapped'.

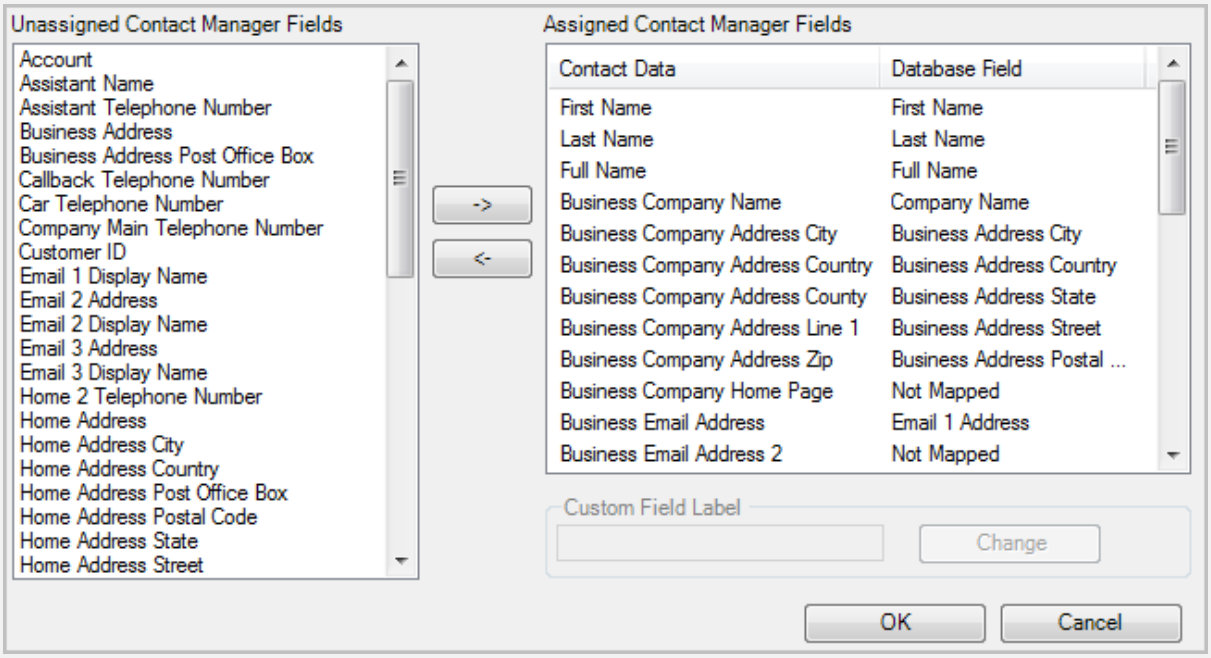
Any fields which have been assigned will be visible in the viewer, but only if there is information present for that field in the data returned from the search for that call. If for instance the caller's address is missing from the database then the viewer will not display any reference to the address fields.

Custom Fields

The wide range of CRM and Contact databases available within MyCalls Desktop may have fields which do not readily have an association with the standard contact fields defined for the contact viewer. To accommodate this MyCalls allows the creation of custom fields. Custom fields can be given any name to identify the data, e.g. Credit Rating, Customer Category and any of the available CRM or contact manager fields can be assigned to this field.

How To: Mapping a Field

Select the required field from the 'Unassigned Contact Manager Fields' using a left mouse click

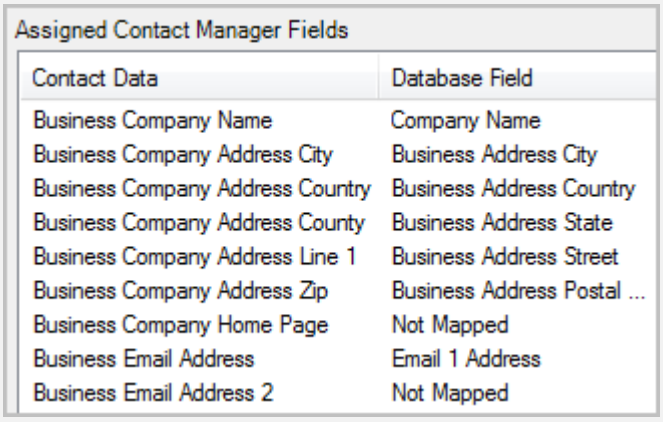


Select the field to which this data will be assigned in the 'Contact Data' list

Click the assign button (->)

The assigned field will appear in the 'Database Field' list alongside the Contact field to which it has been assigned. Contact data refers to the local Contact viewer field and the Database Field refers to the raw database field found in the CRM or contact manager application

Any field marked as 'not mapped' will not appear in the screen-pop viewer



Selecting the assigned field in the assigned field list and clicking the un-assign button (<-) will remove the mapping of the field and revert to 'Not Mapped' state

How To: Assign a Custom screen-pop Field

Select the Unassigned data field

Select the required Custom field from the assigned field list

Using the 'Custom Field Label' textbox enter a name to the custom field

Click the assign button (->)

The Custom field will now appear in the Contact viewer and display the assigned data

System screen-pop interfaces

Configuration of a system interface is identical to the configuration of the personal interfaces as far as configuring the list of interfaces is concerned. Because a system interface can be used by many users you also need to configure group access settings which define who within the organisation can access which interfaces and the privileges members of those screen-pop groups will have.

The basic operation requires that any users (enabled for call control) can be assigned to one or more interfaces. If a user is to be assigned access to more than one screen-pop interface (database) then you will also need to configure your screen-pop interfaces into groups. This is done in two separate operations.

Configuration of screen-pop database groups

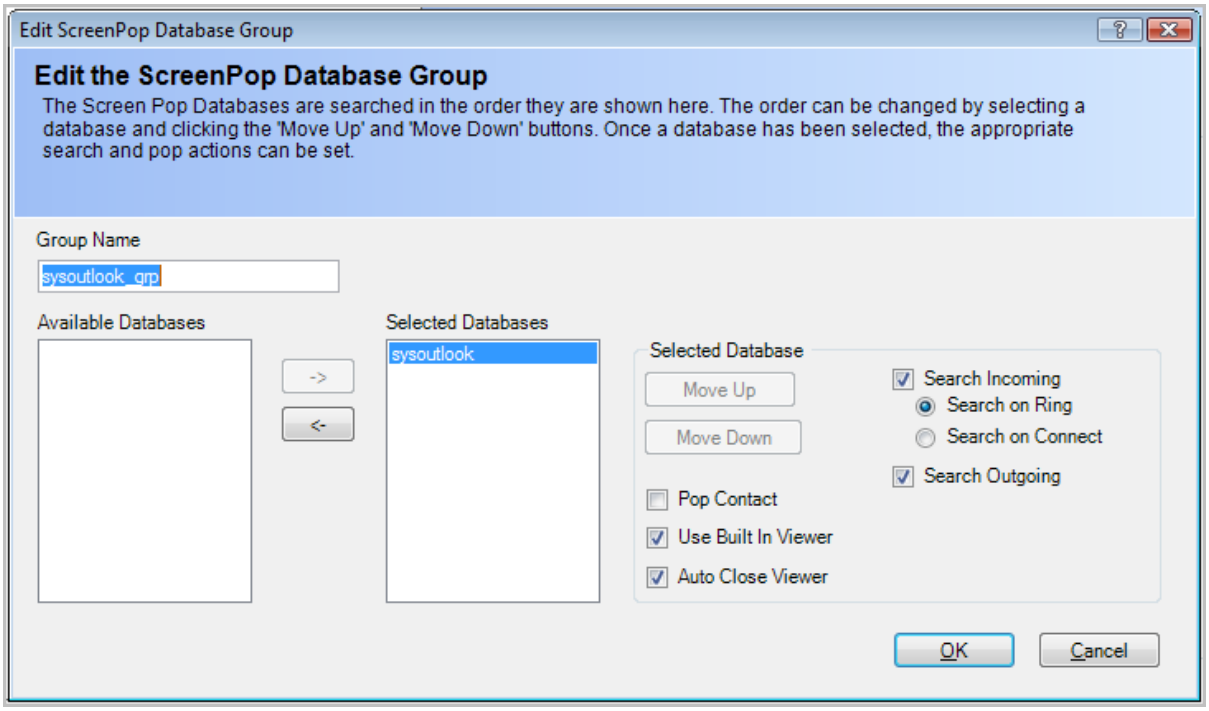
A screen-pop database group can contain one or more databases from the list of system screen-pop databases. In order to pop information from a system database it must be added to a screen-pop database group.

Once added to a group then permissions can be set as follows:

Pop Contact: Brings up the Client application screen if a contact is found rather than the built in contact viewer.

Use Built in Viewer: Use the internal screen-pop viewer or only pop the screen-pop-client application.

Auto Close: Close the viewer automatically once the call has completed.


Edit ScreenPop Database Group
Edit the ScreenPop Database Group
The Screen Pop Databases are searched in the order they are shown here. The order can be changed by selecting a database and clicking the 'Move Up' and 'Move Down' buttons. Once a database has been selected, the appropriate search and pop actions can be set.
Group Name
sysoutlook_grp
Available Databases
Selected Databases
sysoutlook
->
<-
Selected Database
Move Up
Move Down
Search Incoming
Search on Ring
Search on Connect
Search Outgoing
Pop Contact
Use Built In Viewer
Auto Close Viewer
OK
Cancel

Screen Pop Database group configuration dialog

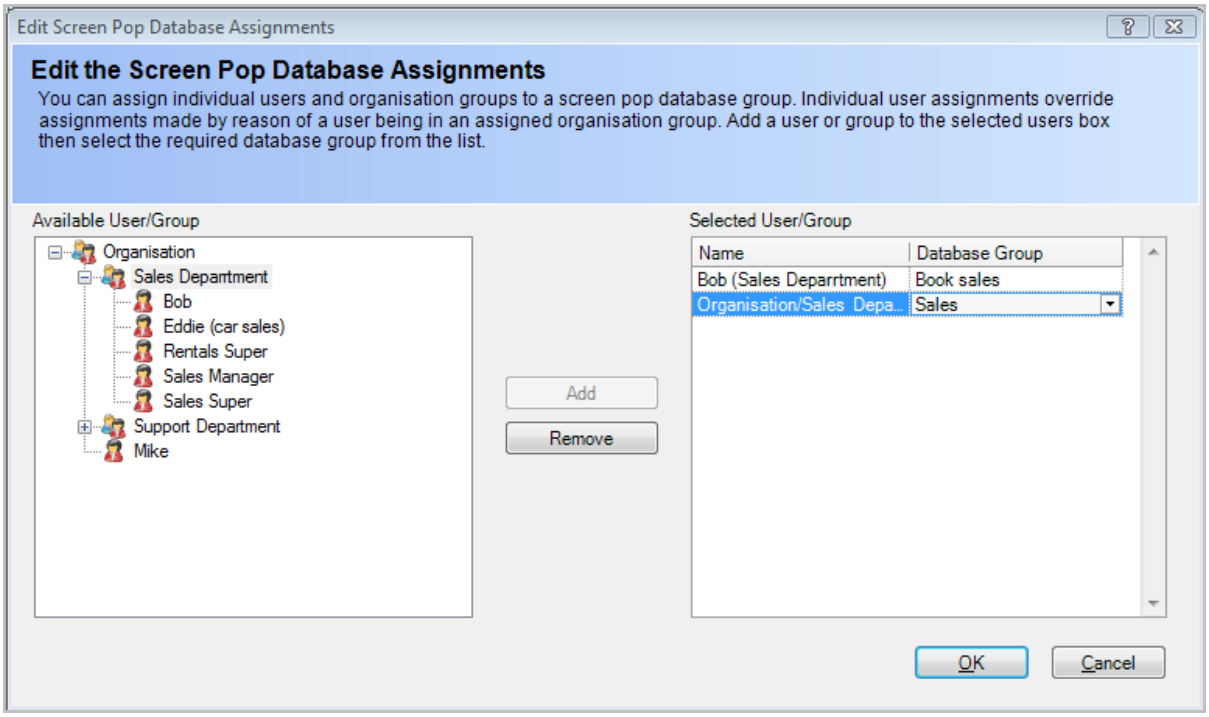
Several databases can be assigned to a single screen-pop database group and their collective behaviours can be defined on the same configuration screen. This allows definition of the search order of the databases within a group and their pop behaviour. Once you have defined the screen-pop database groups then you can users to these groups using the screen-pop database assignment configuration screen

Configuration of screen-pop database assignments

This dialog allows users to be associated with the groups of screen-pop databases you have already defined in the previous step. You can assign organisational groups or individual users to search the various database groups. Assigning a user to a database overrides any group assignments which may have been made.

For example if an organisational group called Sales has been created and the Sales group has been associated with the company's Sales database, then any member of the Sales group could automatically be presented with contacts from the Sales database when receiving a call.

However if a member of that team, Bob, is associated with a special 'Book Sales' database then Bob will only be presented with Book Sales contacts and Sales contacts even though Bob belongs to the organisation group 'Sales'.


Edit Screen Pop Database Assignments
Edit the Screen Pop Database Assignments
You can assign individual users and organisation groups to a screen pop database group. Individual user assignments override assignments made by reason of a user being in an assigned organisation group. Add a user or group to the selected users box then select the required database group from the list.
Available User/Group
Organisation
Sales Department
Bob
Eddie (car sales)
Rentals Super
Sales Manager
Sales Super
Support Department
Mike
Add
Remove
Selected User/Group
Name
Database Group
Bob (Sales Deparrtment)
Book sales
Organisation/Sales Depa...
Sales
OK
Cancel

Users or groups of users can be assigned to a system screen-pop database group.

Chapter 12

Contacts and Address Books

MyCalls Desktop provides an inbuilt address book for storing your company and personal contact lists. These address books are intended to be populated from:

- screen-pop databases (both system and personal)
- MyCalls callers list
- Manual entry

System versus Personal address books

As with the screen-pop databases, MyCalls address books can be set up as system wide or personal. The System address book is set up by the pbx administrator and contains contacts available to all users. Initially the system address book is populated with the details imported from the pbx ABBdial list during the configuration import carried out at installation time.

Personal address books are set up by each user and are specific to that user.

Whilst it is possible to add contacts manually the address books are intended to contain copies of existing contacts maintained within MyCalls.

Quick tip:

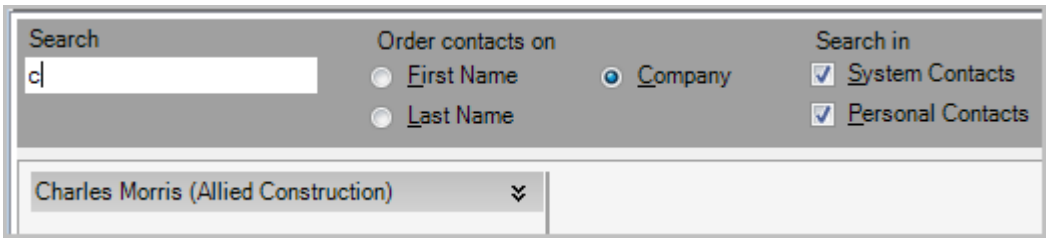
This allows faster searching if an external contact database proves too slow and provides a central location from which to dial any contact contained within your address books.

Using the address books

The address books can be used for quickly searching for a contact, viewing contact details and dialling a contact from the screen.

Searching for contacts

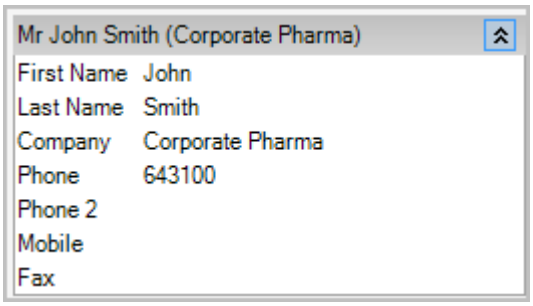
Using the address book search bar you can enter initials or telephone number of the contact to search for. You can limit the search to system, personal or both and you can order the results on first, last or company, name.



Any search results are limited to the first 100 matches, however you can continue to narrow down the result set by entering more characters for the search. If you were searching for a name such as 'Davis', for example, simply entering a 'd' could return over 100 results but entering 'da' would return significantly less.

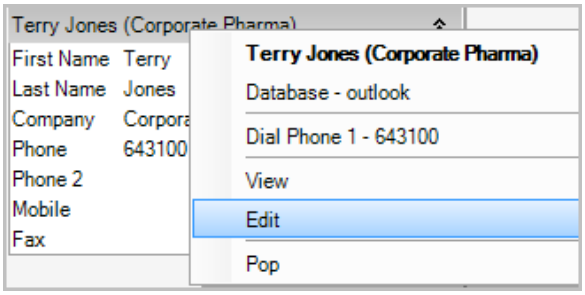
Viewing contact details

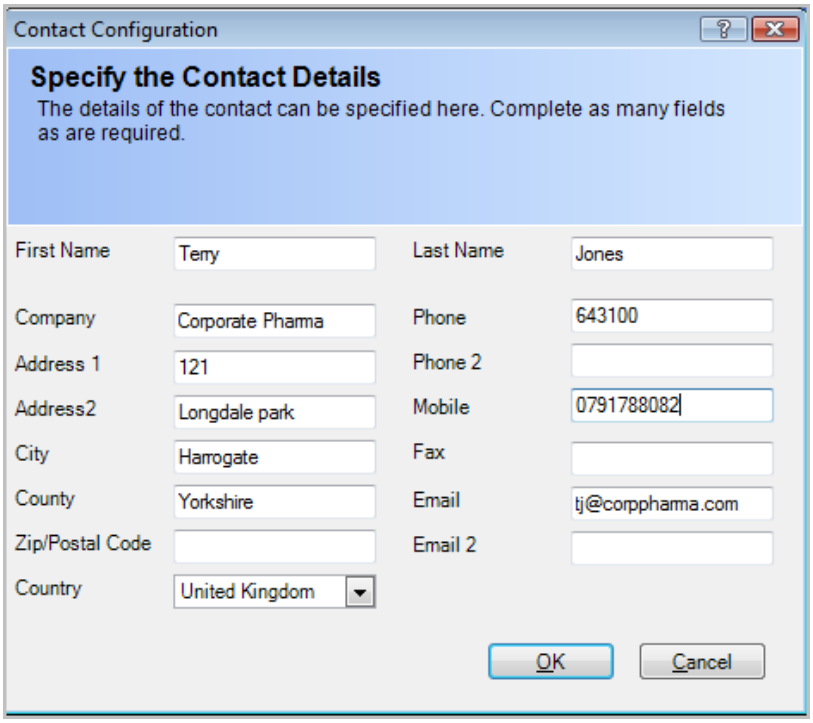
Having located a contact you can view their details by selecting the contact in the list



Edit an address book entry

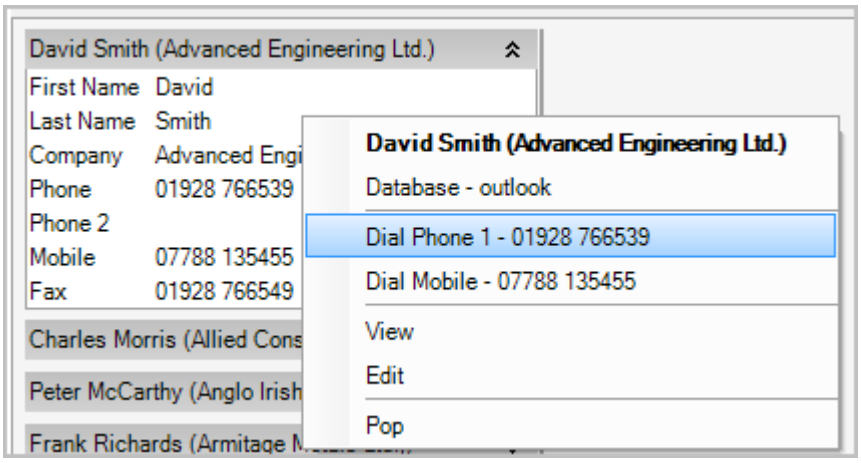
To change any details select the contact using the right mouse button and select 'edit' from the context menu. You can then edit the contact details panel.





Dialling from the address book entry

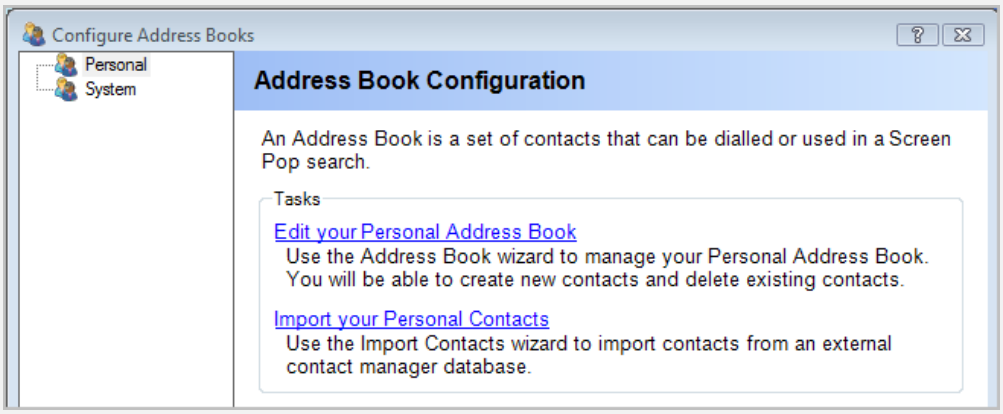
Select the entry using the right mouse button and select dial from the context menu. For many contacts there will be more than one phone number defined so you will need to select the phone number to dial before dialling using the left mouse button.



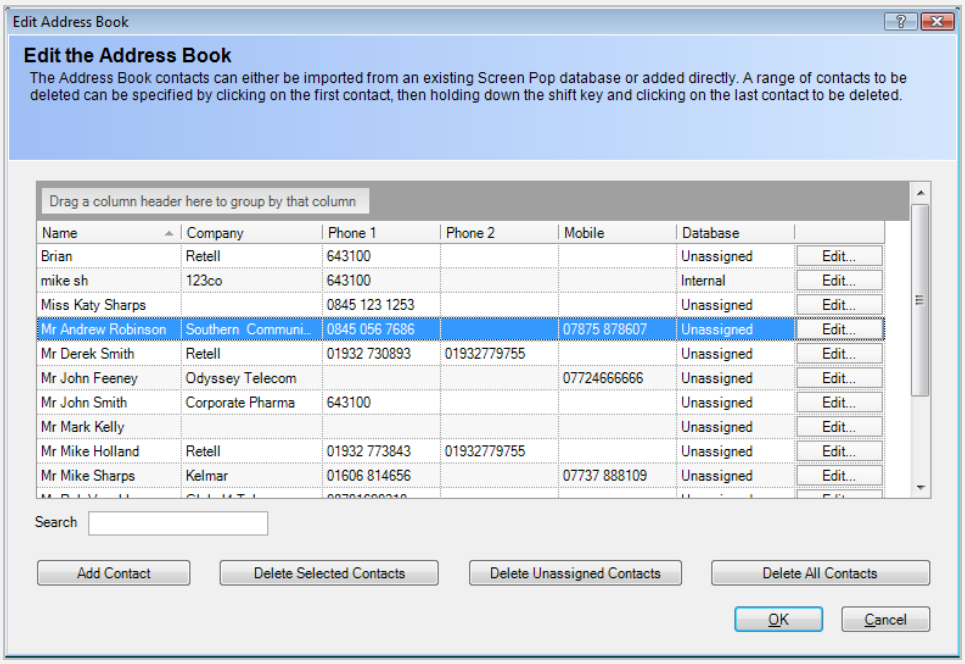
How To: Edit several contacts

Contacts can be edited via the Address book configuration menu.

Select Configure->Address Book and select personal or system address books


Configure Address Books
Personal
System
Address Book Configuration
An Address Book is a set of contacts that can be dialled or used in a Screen Pop search.
Tasks
Edit your Personal Address Book
Use the Address Book wizard to manage your Personal Address Book. You will be able to create new contacts and delete existing contacts.
Import your Personal Contacts
Use the Import Contacts wizard to import contacts from an external contact manager database.

Select 'Edit your Personal Address Book'


Edit Address Book
Edit the Address Book
The Address Book contacts can either be imported from an existing Screen Pop database or added directly. A range of contacts to be deleted can be specified by clicking on the first contact, then holding down the shift key and clicking on the last contact to be deleted.
Drag a column header here to group by that column
Name
Company
Phone 1
Phone 2
Mobile
Database
Brian Retell 643100 Unassigned Edit...
mike sh 123co 643100 Internal Edit...
Miss Katy Sharps 0845 123 1253 Unassigned Edit...
Mr Andrew Robinson Southern Communi... 0845 056 7686 07875 878607 Unassigned Edit...
Mr Derek Smith Retell 01932 730893 01932779755 Unassigned Edit...
Mr John Feeney Odyssey Telecom 07724666666 Unassigned Edit...
Mr John Smith Corporate Pharma 643100 Unassigned Edit...
Mr Mark Kelly Unassigned Edit...
Mr Mike Holland Retell 01932 773843 01932779755 Unassigned Edit...
Mr Mike Sharps Kelmar 01606 814656 07737 888109 Unassigned Edit...
Search
Add Contact
Delete Selected Contacts
Delete Unassigned Contacts
Delete All Contacts
OK
Cancel

You can modify many values directly in this screen or click edit to bring up the contact details screen.

This window also allows you to add a new contact and to delete contacts. You can select one or more contacts and delete the selection, delete all contacts or delete unassigned contacts. Unassigned contacts are those not associated with an existing screen-pop database as a result of that database having been deleted from the configuration.

Importing from screen-pop databases

Normally you will add contacts to an address book by importing from an external source.

Before you can import your contacts the external contact database must be configured either as a system or personal screen-pop database. System databases can only be managed by a pbx administrator.

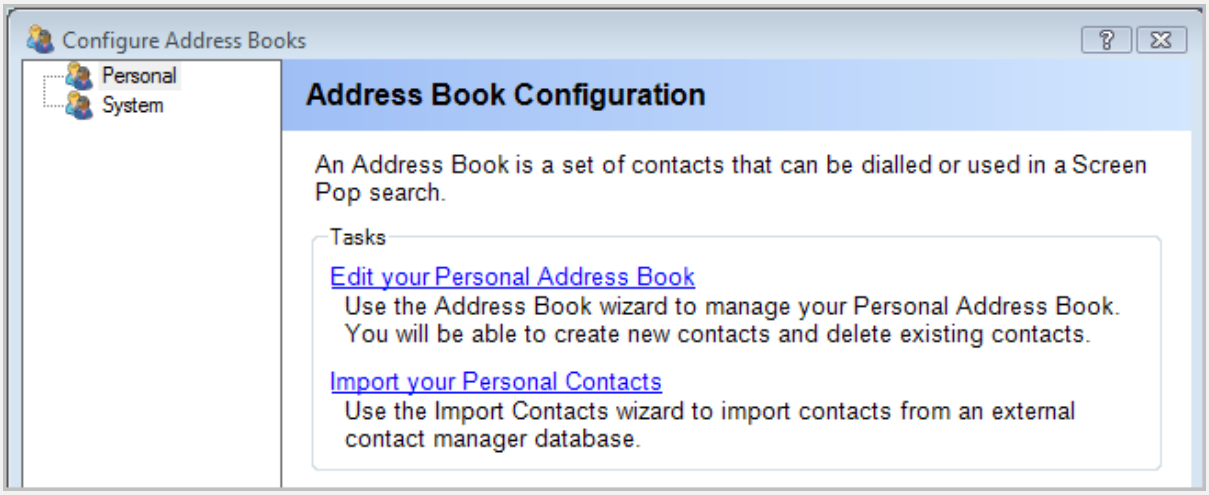
Quick tip:

Import your most used contacts from an external database where possible. This speeds up searches and reduces loading on network resources etc.

How To: Importing a personal screen-pop database

Select configure->Address Books

Select Personal in the top left dialogue, then select import your personal contacts


Configure Address Books
Personal
System
Address Book Configuration
An Address Book is a set of contacts that can be dialled or used in a Screen Pop search.
Tasks
Edit your Personal Address Book
Use the Address Book wizard to manage your Personal Address Book. You will be able to create new contacts and delete existing contacts.
Import your Personal Contacts
Use the Import Contacts wizard to import contacts from an external contact manager database.

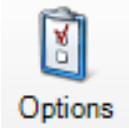
From the import panel select the database to import using the drop down list

Select Start and the import will commence

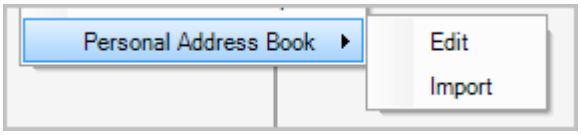
Once complete click ‘OK’

Configuring Address books using MyCalls Desktop

The same operations can be carried out within MyCalls desktop by selecting the toolbar options



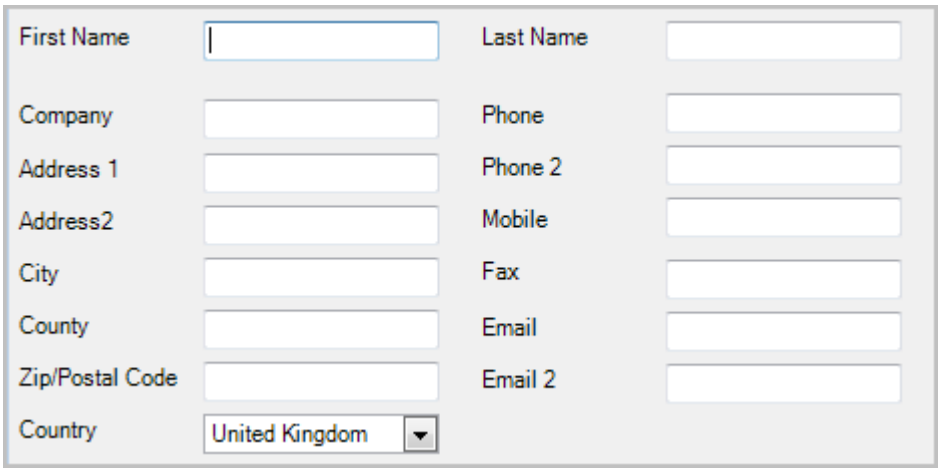
Select ‘Personal address book->Import’



Manual entry of contact data

New entries can be added by selecting ‘Add New Contact’ from the contact search bar.

Selecting this will display the Contact details dialogue. Enter the contact details and click ‘OK’



Managing System Contacts

The operations described for personal address books and contacts apply equally to system contacts. The only difference is that configuration and importing of system contacts can only be carried out by the pbx administrator. When importing system address books only the screen-pop databases defined for the system will be shown in the selection list of databases to import from.

Configuring the internal contacts lists for screen-pop purposes

Quick tip:

One reason for importing your external contacts into MyCalls would be to speed up searching. By importing the data the contacts would be held in the internal MyCalls database and any searches would be highly optimised rather than relying on the performance of third party software clients.

To enable the system to screen-pop on the imported address book rather than searching the external data you need to perform the following tasks

- Configure the internal contacts as a screen-pop database.
- Add the internal data to a screen-pop group

How To: Configure an internal contact screen-pop

Select 'Configure->screen-pop' from the main MyCalls menu

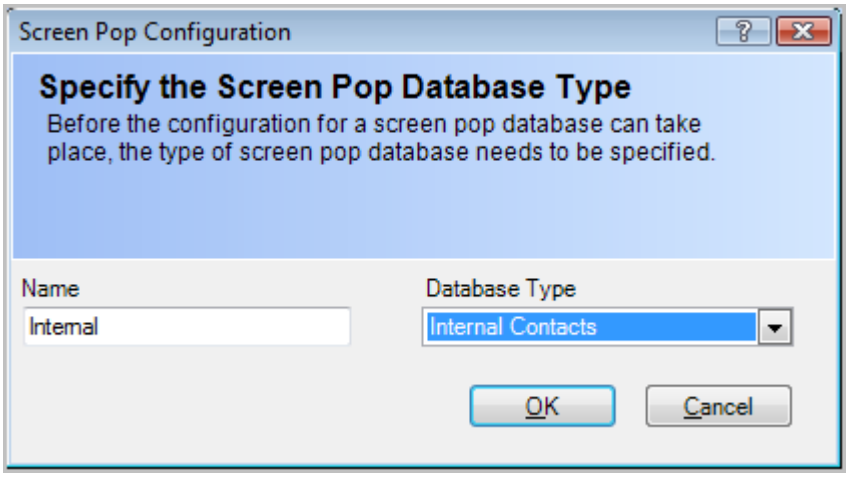
Select either personal or system*

Create/Edit screen-pop databases

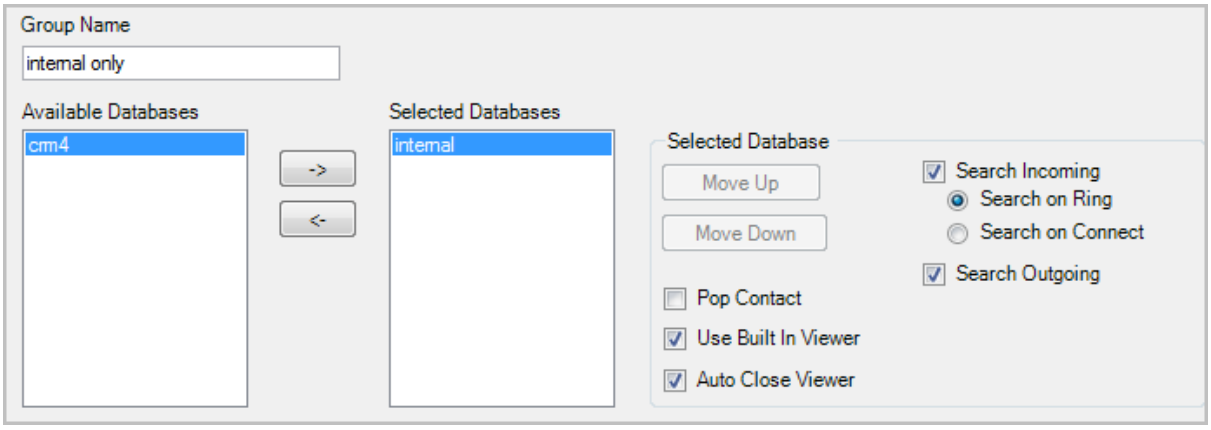
Add a new interface and select 'Internal' from the drop down list

Click 'OK'

NB: The internal contacts list requires no additional configuration and therefore does not present a configuration screen


Screen Pop Configuration
Specify the Screen Pop Database Type
Before the configuration for a screen pop database can take place, the type of screen pop database needs to be specified.
Name
Internal
Database Type
Internal Contacts
OK
Cancel

Having added the internal contacts to your list of screen-pop databases you will need to set up a screen-pop group to include the internal contacts list. See Configuring screen-pop groups for more details.



*only available if you are a pbx administrator

Call Control Configuration: Summary.

Basic Installation

Ensure the TAPI driver is installed (Installation)

Ensure MyCalls is licensed for Desktop use and that the license is registered (License Manager)

Users and extensions

Create users and assign call control to those users. (User configuration)

Enable Users for hot desking if required

Configure extensions and assign default users to extensions

Enable required extensions for hot desking

Call control

Configure Call Control

Configure Call Control groups

System screen-pop

Configure screen-pop interfaces for system databases

Configure system screen-pop database groups

Assign organisation users and groups to the various system screen-pop groups

Personal screen-pop

Configure personal screen-pop interfaces e.g. outlook

Configure screen-pop database groups

Address Books

Import required external database contacts into the internal address book

Configure internal contacts database (Your address book contents) as a personal screen-pop interface if required

Chapter 13

Callers

Introduction to Callers

Within MyCalls people or companies external to the organisation that you call or who call you, are referred to as callers. Callers can be categorised by a type as either:

- Business Callers
- Personal Callers
- Unassigned Callers

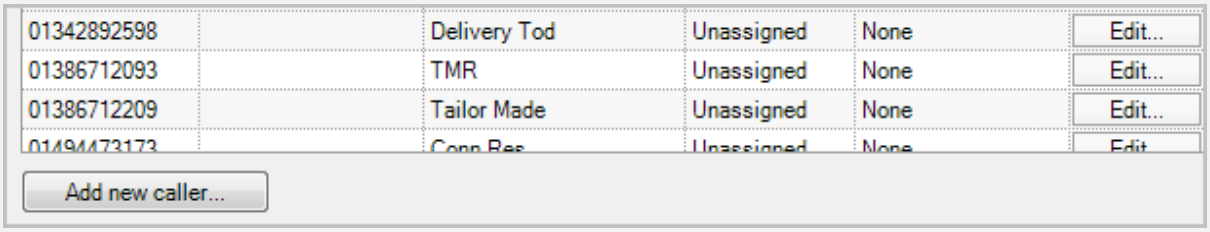
Callers can also be placed into user groups, so all the contacts within a particular company can be grouped together. Personal numbers can also be placed into a user group, such as "Terry Breen's Personal Callers". Setting the type of caller and placing them into a user group allows reports to be generated that are filtered to only show those callers, and thereby identifying if someone is taking or making too many personal calls.

The callers configuration screen can be shown by selecting the 'Callers' option from the 'Configure' menu or by pressing the callers icon from the main toolbar.

Creating and editing callers

How To: Creating a new Caller

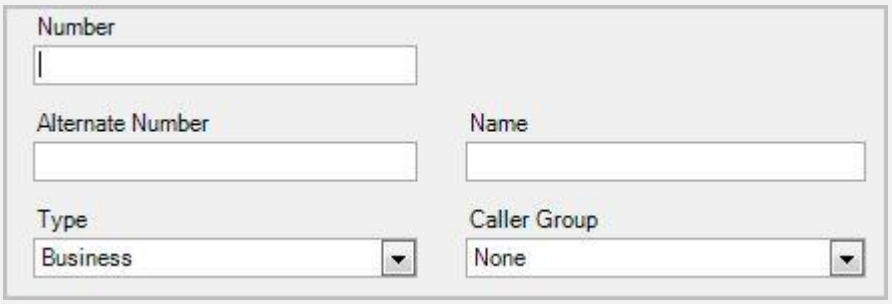
1) At the Configure Callers screen, click 'Create or Edit a Caller.' The Edit Callers screen appears.



2) Click 'Add new caller' to begin adding a new caller.

3) The Create a Caller screen is displayed.

4) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.



5) **Number*:** Enter the callers' main incoming number here that will be used to identify them.

6) **Alternate Number:** If the caller has different incoming and outgoing numbers, a DID for instance, then use the alternate number field for this.

7) **Name:** Enter a name for your caller to identify them clearly on real time windows and reporting.

8) **Type*:** You can choose whether a caller is a Business or Personal caller by selecting the option from this field. If you wish to create the caller but not assign them as either of the above then you can use the final option Unassigned until you decide on the most suitable type for the caller.

9) **Caller Group:** You can select a caller group from this field to group the caller with in order to enhance real time statistics and reporting. Caller groups are created by users and tailored to the organizations requirements. Default is set to None.

10) **Notes:** Use the notes field to log any useful information about the caller for other users to see.

11) Click 'OK'.

12) The caller should now be visible in the caller list of the Edit Callers window.

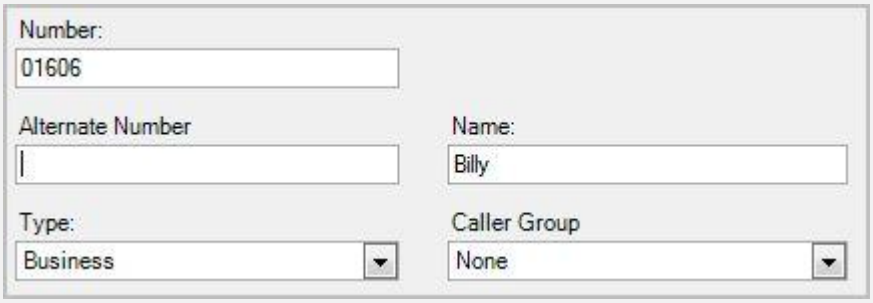
How To: Editing an existing Caller

1) From the Callers Configuration screen, click 'Create or Edit a Caller'

2) In the Edit Callers window that appears click the 'Edit...' button to the right of the Caller you want to modify.

3) In the 'Edit' window that appears, you can modify the following fields; Alternate Number, Name,

Type, Caller Group and Notes. You cannot change the Number field as this is the main identifier of the caller. To change this you would have to create a new caller record and delete this record if necessary.



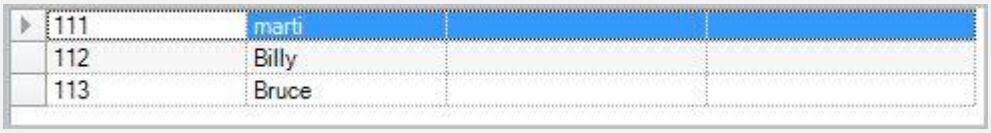
Click the 'OK' button when you have completed making your changes.

Click the 'OK' button on the Edit Callers window to save the changes you have made.

Deleting callers

How To: Delete a single or a range of Callers

1) From the Callers Configuration screen, click 'Delete a Range of Callers'.
2) In the window that appears, select the callers you want to delete in the callers list. You can select multiple callers by holding down the control key (ctrl) as you click on the rows.



3) Press 'OK' to complete the deletion process. Be aware that you will not be prompted to confirm this process once you press the 'OK' button so please make sure you have the right callers highlighted before pressing 'OK' to continue.

Importing Callers

You can import a csv (comma separated values) file directly into MyCalls to speed up caller setup. This file should include the following columns: Number, Alternate Number, and Name, in that order to be imported successfully.

For more detailed information see the section on importing data.

Caller Groups

Caller groups are groups that contain callers that are related in some way within a business. By using Caller Groups it is possible to report over a range of callers such as all business callers or all personal callers.

System and User defined groups

User defined groups are custom groups that have been created by users, whilst system groups are those that are pre-installed with the application and cannot be removed. There are four system groups that can be used which are:

- All business callers - Holds callers that are of type Business
- All Callers - Holds all callers defined in the system.
- All Personal Callers - Holds callers that are of type Personal.
- Unassigned Callers - Holds callers where there type has not been specified.

How To: Creating a new Caller group

1) From the Callers Configuration screen, click 'Create a Caller Group'.
2) In the 'Create a New Caller Group' window that appears, a number of fields are available for entry. Some are mandatory fields* for successful setup whilst others are optional inputs as outlined below.
3) **Name*:** Enter a name to describe the caller group you are creating.
4) **Notes:** Enter here any relevant details you wish to save about the caller group
5) When you have entered the necessary information click the 'OK' button to create the caller group.

How To: Editing Caller group configuration

1) From the Caller Group Configuration screen, click 'Caller Groups' and select the group you want to edit. Click 'Edit Caller Group Configuration' in the Caller Group configuration area.

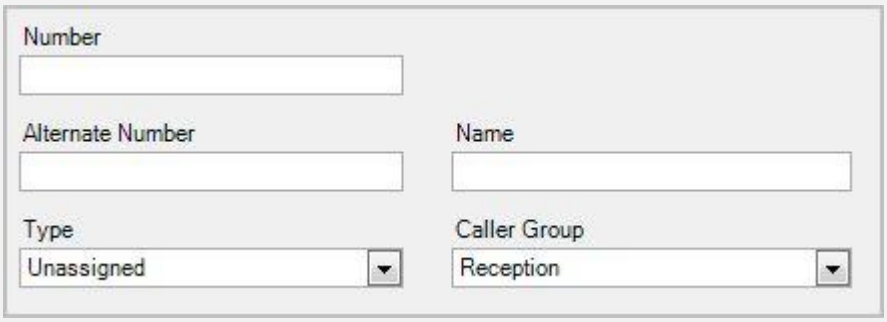
2) In the 'Edit a Caller Group' window that appears you can enter notes to describe your selected group.
3) Click 'OK' to save your changes.

How To: Delete Caller group configuration

1) From the Caller Configuration screen, click 'Caller Groups' and select the group you want to delete.
2) Click 'Delete Caller Group'
3) You will be prompted to confirm deletion of the selected group.
4) Click 'OK'

How To: View or Edit group membership

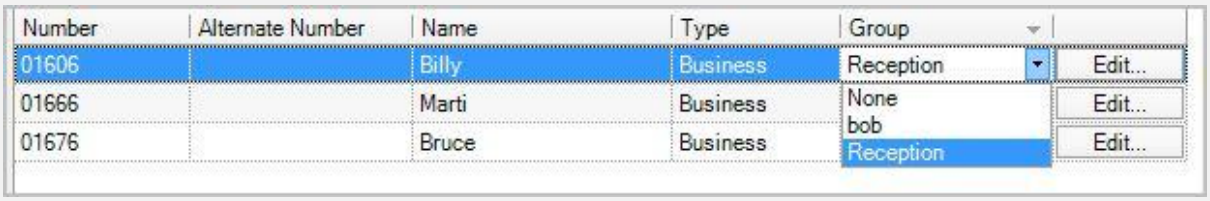
1) From the Callers Configuration screen, click 'Caller Groups' and select the group you want to configure.
2) Click 'View or Edit the Group'
3) In the 'Edit Group Membership' window that appears you will see a list of callers in the group which will have been configured using the methods described in the manual, sections 6.1.1, 6.1.2 or 6.1.4 or by clicking on the 'Add new caller…' button and creating a new caller directly in the group.
4) You can edit the Alternate Numbers and Names of the callers in this group. Select a new Type using the Type Column. And you can also change group membership for a member by selecting another available option in the Group field.



5) Press 'OK' to close the window and save any changes you have made.

How To: Assigning Callers to a group

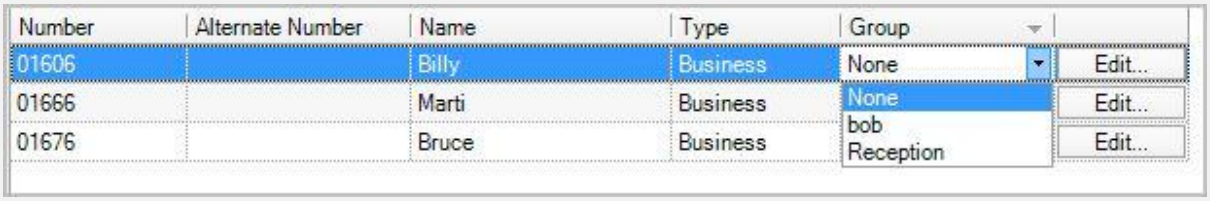
1) If you have configured Caller Groups then you can group individual callers within a group to enhance real time statistics and make reporting easier.
2) On the Edit Callers window that is displayed you can either click 'Edit' next to the caller you wish to edit the group for and alter the group in the window that appears, or you can do it here by selecting a new group in the Group column. You can change as many callers as you wish before saving your changes.



3) When you are happy with your callers selected groups press the 'OK' button to save your changes.

How To: Removing a Caller from a group

1) From the Callers Configuration screen, click 'Create or Edit a Caller'
2) On the 'Edit Callers' window that is displayed you can either go to the Edit a Caller window to change the callers group to or you can do it here by using the 'Group' column. Select the option 'None' to remove the caller from any previously selected groups. You can change as many callers as you wish before saving your changes.



3) When you are happy with the changes you have made and want to save them press the 'OK' button.

Deleting a Caller group

How To: Delete a Caller group configuration

1) From the Caller Configuration screen, click 'Caller Groups' and select the group you want to delete. Click 'Delete Caller Group' in the Caller Group configuration area.
2) You will be prompted to confirm deletion of the selected group.
3) Click 'OK'

Chapter 14

Alarms

Managing by exception using the MyCalls Alarm System

We believe that people should not have to spend a long time analyzing report information just to find that everything is OK. This has historically been the case in companies that use call accounting or other telephone management software for many years.

MyCalls is designed to be used with management by exception. That is, the system is configured to watch for specific conditions and only inform users when one of those conditions has been broken. This then leaves the supervisors and PBX administrators free to do other activities.

Specify when Alarms are active:

To facilitate the automated notification of alarm conditions MyCalls is provided with an alarm scheduler which allows you to specify when alarms can be active. You can create as many alarm schedules as required e.g. Daytime, Night time, Weekends and apply the schedules to the different alarms that you create. For example you may want to activate alarms from certain extensions out of hours to catch any unauthorised usage.

Specify who receives Alarm notifications:

Generating alarms is only one part of the equation. In order to make the MyCalls system really work for you the alarms need to be sent to the people in the organisation who need to know about it. MyCalls provides distribution lists to do just that. You can set up multiple distribution lists which allows you to specify different recipients for different types of alarms. For example System alarms may be sent to your IT specialists (possibly outside the organisation) whereas Fraud Alarms may be sent to supervisors.

Alarm Categories

MyCalls currently has the following different types of alarm with more added on each release of software.

System Alarms:

These are triggered when either no data is received from the PBX for a certain period or if the free disk space on the disk that the database is situated on is below a specified level.

Call Rate Alarms:

Measures the rate at which calls have been handled in a one hour period. This can occur if there are either too few or too many calls handled. Too few indicates that calls are taking too long and too many indicates that calls may too short. There are several types of call rate alarm:

- Abandoned Call Rate Alarms:
- Outgoing Call Rate Alarms:
- Incoming Call Rate Alarms:

Overflow Alarms:

An overflow alarm indicates when an overflow situation has occurred. This happens when a call has been transferred between ACD Groups before being answered. For other PBX types, Overflow is defined as a call that has been transferred between ACD Queues (Pilot Numbers) before being answered.

Wait Time Alarms:

Determined by what is an acceptable minimum and maximum average wait time for a one hour period. An average wait time that is less than the minimum value can indicate that you have too many free staff and they are just waiting for the phone to ring. An average wait time that is more than the maximum value indicates that there may not be enough staff available. Wait time alarms include:

- Incoming Wait Time Alarms
- Overflow wait time Alarms
- Abandoned Wait Time Alarms

Call Time Alarms:

Determined by what the acceptable minimum and maximum average call times should be in a one hour period. An average call time that is less than the minimum value can indicate that you may be rushing your calls. An average call time that is more than the maximum value indicates that the calls are taking too long and you may need to speed up the conversation.

- Overflow Call time Alarms
- Outgoing call time Alarms

Service level alarms

General Service Level Alarms: Are triggered when the general service level drops below the defined minimum service level setting for the alarm. A value below the minimum average can indicate that there are not enough staff members available to take all of the calls. Conversely, if the value is above the maximum value it might indicate that there are too many people available to answer calls.

Abandoned Service Level Alarms: Are determined by the minimum and maximum average Abandoned Grade of Service (GOS) in a one hour period.

Emergency Alarms: These are triggered when a call is made to an emergency number. You can specify what constitutes an emergency number.

Toll Fraud Alarms: These alarms are used to detect misuse of the phone system. These alarms can detect if a call is too expensive or lasts for too long or is to/from a specific destination which is considered to be unauthorised.

Caller Alarms:

These alarms are used to determine if a caller has been contacted within a specified time period.

Queue Status Alarms: These alarms are used to determine the acceptable number of calls in a queue, and also the acceptable amount of time that a call can remain in a queue before being answered.

User Status Alarms: These alarms are used to determine the maximum allowable number of times a user may go into each of the Unavailable/Wrap up/DND states in a logged on period. Also determines the maximum length of time a user is allowed to remain in that state.

Viewing the alarms

When an alarm is triggered, an alarm record is generated and stored in the database. These can be seen in the Alarms Real Time list View. See; Real Time List Views

An alarm icon is also displayed in the system tray when an alarm is triggered. This icon will remain in the system tray until the alarm window has been clicked with the mouse button, to indicate it has been viewed.

Audible alarms

Audible alarms can be configured on a severity level; Information, Warning, Severe, Critical.

When an alarm is triggered, if a sound has been assigned to the severity of the alarm, then that sound will be played. The sound can be configured to be played repeatedly until either an alarm of a higher severity is triggered, or until the alarm window has been clicked on with the mouse button, to indicate it has been acknowledged.

Accessing Alarm Options

Using the MyCalls menu you can access the alarm screens using:

Configure –> Alarms –> PBXs

OR, you can click the alarm icon in the toolbar

Configuring Real Time Alarms

MyCalls alarms are generated in real time. You can have the alarms pop up on screen to warn operators of alarm conditions as they occur. Alarms are also recorded in the Alarms grid accessible from the toolbar at the bottom of the main screen.

When you configure an alarm you will invoke an alarm configuration wizard. The wizard will require you to enter the name for the alarm and select both a distribution list and an alarm schedule. The distribution lists will ensure the alarm reaches the appropriate people and the schedule limits the time periods when the alarm is active so before you can configure an alarm you will need to have set up your alarm schedules and distribution lists. These topics are covered in more detail toward the end of this section.

System Alarms

System alarms monitor the status of the system. This falls into two parts:

- PBX data monitoring
- Disk space monitoring

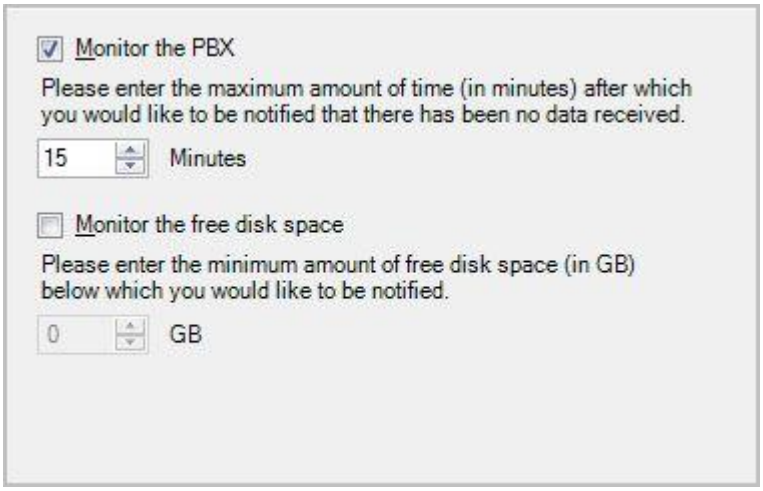
PBX Data Monitoring

The MyCalls system regularly receives call data from the PBX. If MyCalls does not receive data from the PBX it could mean there is a fault on the PBX. This alarm checks to see how long ago the last call record has been received from the PBX. This can indicate that the link between the PBX and the call processor has failed.

Setting this alarm to be active on an alarm schedule which covers only the working hours, will mean that this alarm is not triggered in the middle of the night when there are likely to be no calls anyway.

Disk Space Monitoring

A minimum amount Disk apace is required for correct operation of the operating system and the MyCalls-database. This alarm checks the current disk space available.


Monitor the PBX
Please enter the maximum amount of time (in minutes) after which you would like to be notified that there has been no data received.
15
Minutes
Monitor the free disk space
Please enter the minimum amount of free disk space (in GB) below which you would like to be notified.
0
GB

Call Rate Alarms

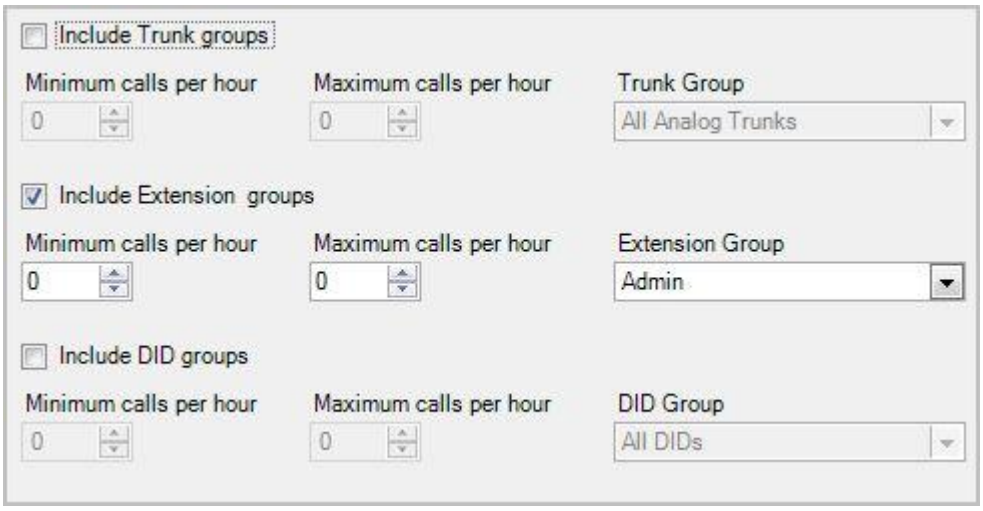
Call rate alarms are triggered if the number of calls is either lower than a specified value or higher than a specified value for the last hour.

The call rate alarms can be set up for both:

- Incoming calls
- Abandoned calls
- Overflowed* calls
- Outgoing calls

*An overflowed call (on a Mitel PBX only) is defined as a call that has been transferred between ACD Groups before being answered. For other PBX types, Overflow is defined as a call that has between ACD Queues (Pilot Numbers) before being answered

The wizard allows you to set minimum and maximum calls per hour for Trunks, Extensions, DIDs, Pilot Numbers, Organisational groups. You can specify all the device groups of a particular type e.g. ‘All Trunks’ or you can select individual device groups.



Performance Alarms

Performance alarms are designed to measure the effectiveness of the people answering or making the telephone calls.

Performance alarms can be set for

- Incoming Wait Time
- Overflowed Wait Time
- Abandoned Wait Time
- Incoming Call Time
- Overflowed Call Time
- Outgoing Call Time
- Abandoned Call Time
- General Service Level
- Abandoned Service Level

The setup of these alarms is identical to the call rate alarms described in the previous section. You select which alarm type you wish to generate e.g. wait time, call duration etc and specify the device or user groups to which this alarm applies. You can only specify one of each device group per alarm setup but you can set as many of each type of alarm as required. For example, to set a wait time alarm for the extension group called 'Sales' with different wait times to the extension group called 'Service' then you would need to create two wait time alarms, each with different settings, which you could call 'Sales' and 'Service' to easily identify each alarm.

Incoming Wait Time Alarm

These alarms can be set to trigger if the average wait time for answered calls over the last hour was too low or too high.

Answering a call too quickly can mean that you may have too many people available to answer the phone or that you customers may perceive that you are just waiting for the phone to ring. It is usual for people to expect to wait 2-3 seconds before the phone is answered.

Answering too late can mean that you do not have enough people to answer the phones and may risk calls being abandoned.

Overflowed Wait Time Alarm

These Alarms can be set to trigger if the average overflow time for answered calls over the last hour was too low or too high.

Having too high an overflow wait time could mean that calls are being transferred between too many queues before being answered. This may indicate that not enough people are answering the calls in the primary groups. An alarm triggered on a low overflow wait time would not normally be used.

Abandoned Wait Time Alarm

These alarms can be set to trigger if the average wait time for abandoned calls over the last hour was too low or too high.

If you base your staffing on the fact that your customers will wait a certain amount of time, then this alarm can tell you if your assumptions are correct or not.

If the alarm is triggered because the average has fallen below the minimum value, then your customers will not wait on average as long as you think, and you may need to either answer the phone quicker or employ more people.

If the alarm is triggered because the average has risen above the maximum value, then your customers are prepared to wait longer than think they will and you may not need as many people to answer the calls.

Incoming Call Time Alarm

These alarms can be set to trigger if the average time taken to handle incoming calls over the last hour was too low or too high.

Overflowed Call Time Alarm

These alarms can be set to trigger if the average time taken to handle overflowed calls over the last hour was too low or too high.

Outgoing Call Time Alarm

These alarms can be set to trigger if the average time taken to handle outgoing calls over the last hour was too low or too high.

General Service Level Alarm

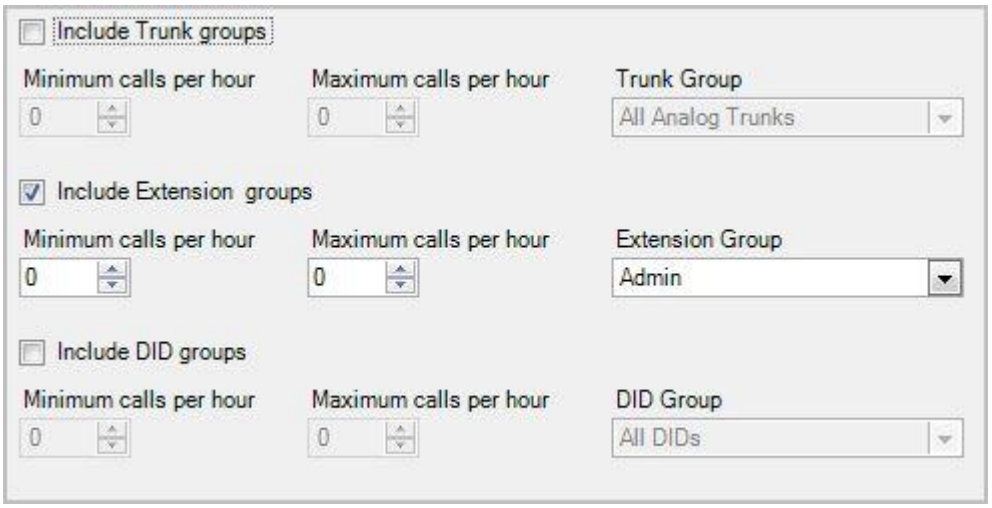
These alarms can be set to trigger if the average service level over the last hour was too low or too high.

Setting a maximum value of 99% rather than 100% can be useful, a 100% value can mean that the people handling the calls are not fully occupied. A definition and configuration guide to Service Levels is covered under Grade of Service configuration.

Abandoned Service Level Alarm

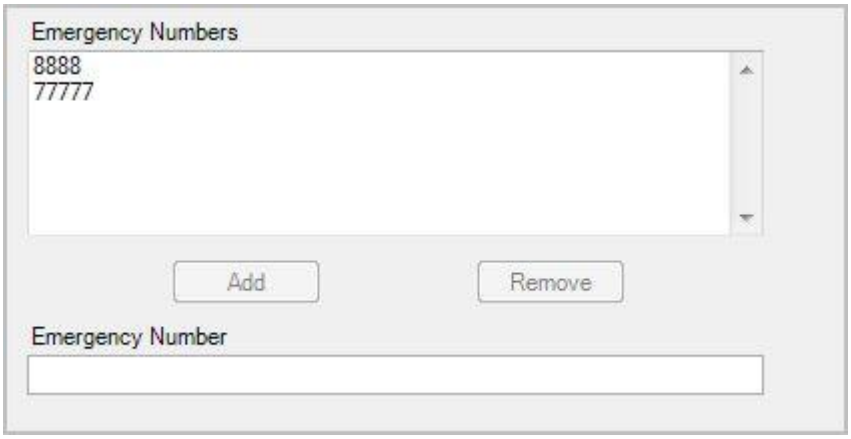
These alarms can be set to trigger if the average abandoned service level over the last hour was too low or too high.

It is quite normal to have a minimum value of 97% and a maximum value of 100%. It is widely accepted that you should not expect to have more than 3% of your calls abandon outside of the acceptable wait time.



Emergency Alarms

Emergency alarms are triggered whenever a call is made to an emergency number.



Toll Fraud Alarms

Toll fraud alarms are designed to trigger if a call has been made that breaks one of your calling policies. The policies available are.

- Calls that are longer than a specified amount time
- Calls that ring for more than a specified amount time
- Calls that cost more than a specified amount of money
- Calls to certain numbers or types of call
- Calls to/from certain caller groups
- Calls that have a specific account code

The toll fraud alarm can be set to be active on extensions, pilot numbers and users.

One alarm can be set to be active on all groups, a specified group or all except a specified group.

Specifying an alarm to be active on all except a specified group is useful if you only want for example, to have one group that can make international calls and the others cannot.

Specifying Outgoing Numbers

When setting up a toll fraud alarm you will probably need to define a set of numbers to identify the calls that you wish to trap within the alarm conditions. For example calls to mobiles beginning with 07 or calls to a specific area code or even call outside a specified set of area codes. When setting these conditions (see example below) you will need to enter either complete or partial numbers.

A number can be specified in the full such as 01260519221.

Partial numbers can either be with one or more specific digits and entered with a '?' or as a starting number followed by any digits and entered with a '*'

01260723?2 will trigger on 01260723002, 01260723012, 01260723022, 01260723032 ... 01260723092

01260* will trigger on any number beginning with 01260.

International numbers from the United Kingdom can be detected by 00*.

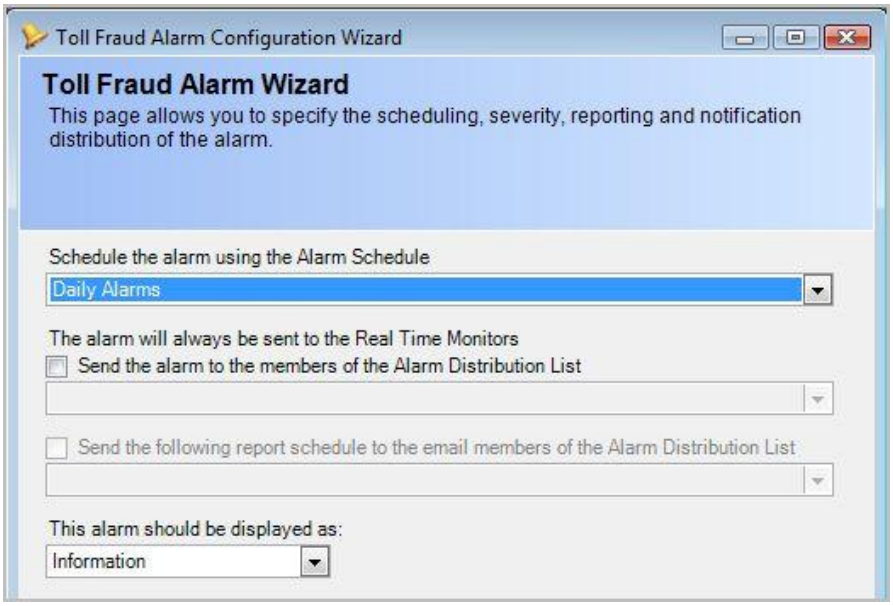
Example Restricting Personal Mobile Calls

Problem: Create a toll fraud alarm that has incoming and outgoing calls selected and traps any non Business calls to a mobile number.

Create a new Toll Fraud Alarm and name it 'Mobile Calls' – Click 'Next'

Toll Fraud Alarm Configuration Wizard
Toll Fraud Alarm Wizard
Please enter a name for this toll fraud alarm, so that others can easily identify it.
Name
Mobile Numbers

Specify the Alarm Schedule associated with this alarm type, in this case we only want to monitor these calls during the daytime so we associate the alarm with the schedule 'Daily Alarms'. You can also associate the alarms with an Alarm Distribution List to define who will receive notification of this alarm. For this example we choose the Managers list.


Toll Fraud Alarm Configuration Wizard
Toll Fraud Alarm Wizard
This page allows you to specify the scheduling, severity, reporting and notification distribution of the alarm.
Schedule the alarm using the Alarm Schedule
Daily Alarms
The alarm will always be sent to the Real Time Monitors
Send the alarm to the members of the Alarm Distribution List
Send the following report schedule to the email members of the Alarm Distribution List
This alarm should be displayed as:
Information

Next you need to specify which Extensions, Users and Pilot numbers you wish to include or exclude from these rules. In this example we exclude Reception and Customer Service from the alarm list. This is because these groups may well make legitimate calls to mobiles during the day. You may need to reconsider how you have organised your groups as any extension can only belong to one group. You may need to split the groups into smaller units for example Customer Service Staff and Customer Service Mobile Callers so that you can ensure only the Customer Service supervisors can call out to mobile numbers.

Toll Fraud Alarm Configuration Wizard
Toll Fraud Alarm Wizard
This page allows you to specify the included extensions, users and pilot numbers. Alarm notifications will only be sent if the extension, user and pilot number present on the call are included in the groups configured below.
Extensions
Include all extensions
Include extensions in this group
Exclude extensions in this group
Reception
Pilot Numbers
Include all pilot numbers
Include pilot numbers in this group
Exclude pilot numbers in this group
All ACD Queues
Users
Include all users
Include users in this group
Exclude users in this group
Customer service

You can specify full or partial numbers to include in the alarm conditions. At this point you are only specifying the numbers list. How these numbers are used to determine an alarm condition is defined in a later step. However the number list can only be used to either

- Generate the Alarm if the Number appears in the list
- Ignore the alarm if the number appears in the list

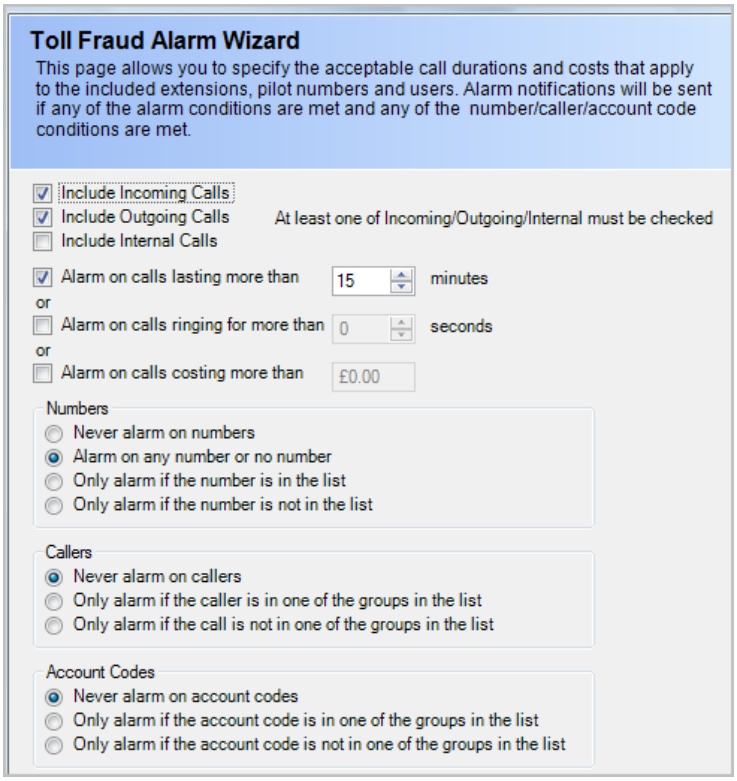
This means that all the numbers in the list need to have the same purpose. In this case we want to generate an alarm if any mobile numbers are called or received. So we specify a list of numbers which represent all the possible number combinations. We specify that any numbers beginning with 07 are mobile numbers there may be other combinations of course.

In the next screen we specify any caller groups that we wish to include in the alarm conditions. Again we can either specify that the alarm be generated if the calls are going to or received from the caller group or we can specify that the alarm is to be ignored if the call is to or from the specified caller group.

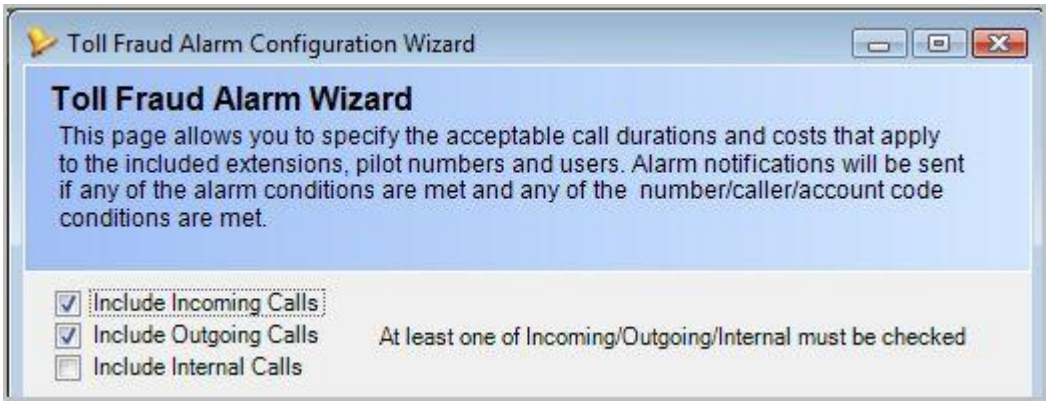
Click 'Next' and a similar screen is displayed to allow the inclusion of a list of account code groups.

Having specified our groups to include or exclude from the alarms, our lists of Numbers to identify and our lists of Callers and Account codes we can then specify the Conditions for the alarm based on these settings.

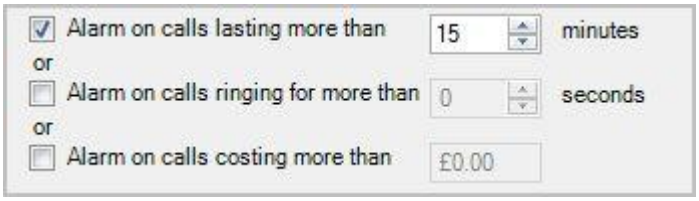
Clicking 'Next' displays the final screen of the wizard


Toll Fraud Alarm Wizard
This page allows you to specify the acceptable call durations and costs that apply to the included extensions, pilot numbers and users. Alarm notifications will be sent if any of the alarm conditions are met and any of the number/caller/account code conditions are met.
Include Incoming Calls
Include Outgoing Calls
Include Internal Calls
At least one of Incoming/Outgoing/Internal must be checked
Alarm on calls lasting more than
15
minutes
or
Alarm on calls ringing for more than
0
seconds
or
Alarm on calls costing more than
£0.00
Numbers
Never alarm on numbers
Alarm on any number or no number
Only alarm if the number is in the list
Only alarm if the number is not in the list
Callers
Never alarm on callers
Only alarm if the caller is in one of the groups in the list
Only alarm if the call is not in one of the groups in the list
Account Codes
Never alarm on account codes
Only alarm if the account code is in one of the groups in the list
Only alarm if the account code is not in one of the groups in the list

First configure which call type we wish the alarm to trap, in this case incoming and outgoing calls are included


Toll Fraud Alarm Configuration Wizard
Toll Fraud Alarm Wizard
This page allows you to specify the acceptable call durations and costs that apply to the included extensions, pilot numbers and users. Alarm notifications will be sent if any of the alarm conditions are met and any of the number/caller/account code conditions are met.
Include Incoming Calls
Include Outgoing Calls
Include Internal Calls
At least one of Incoming/Outgoing/Internal must be checked

Then specify timing or costing conditions for the alarm. You can specify the maximum ring time* beyond which an alarm will be generated, the maximum call duration and the maximum call cost. To set any or all of these limits simply select the appropriate checkbox and using the numeric setting specify the time in seconds.



*Ring time alarms only apply to incoming calls.

Next we can specify how the Number list, Caller list and Account code list affect the alarm generation. For an alarm to occur the conditions must be met for all three lists.

For list parameter we can specify:

Never alarm on items in the list – effectively ignore this list.

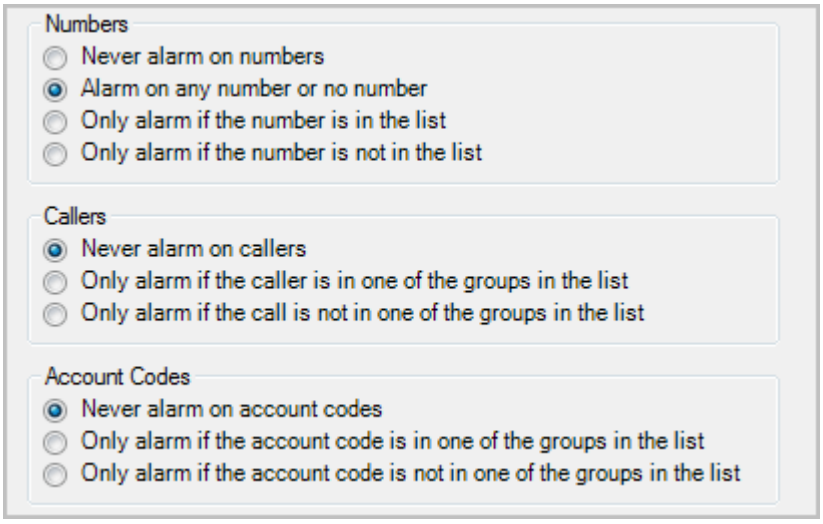
Alarm if the item is in the list – your list should only contain members on which you want to include for alarm purposes. This means you have created a list of prohibited members e.g. any member of the list is not allowed to make mobile calls.

Alarm if the item is not in the list – The list should only contain members which you wish to ignore for alarming purposes. This means you have created a list of allowed members e.g. anyone in the list is allowed to make mobile calls.

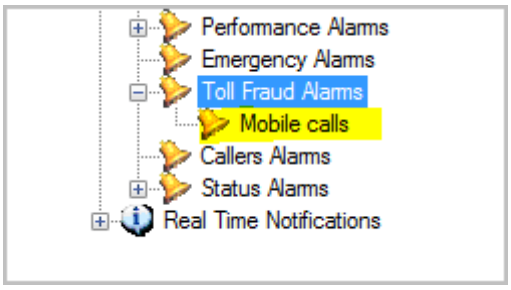
And for numbers only

Alarm on any number or no number (the default value) - Generate an alarm irrespective of the presence or absence of a number in the call. This ensures that if any of the three lists; Numbers, Callers, Account Codes are used then the alarm will still be active.

NB: If you set 'Never alarm on numbers', 'Never alarm on callers', 'Never alarm on account codes' all at once the alarm will not be generated.


Numbers
Never alarm on numbers
Alarm on any number or no number
Only alarm if the number is in the list
Only alarm if the number is not in the list
Callers
Never alarm on callers
Only alarm if the caller is in one of the groups in the list
Only alarm if the call is not in one of the groups in the list
Account Codes
Never alarm on account codes
Only alarm if the account code is in one of the groups in the list
Only alarm if the account code is not in one of the groups in the list

Finally once you are happy with your settings you can click 'Finish' which will save the new alarm you have created. The new alarm will now appear in the Toll Fraud alarm list.

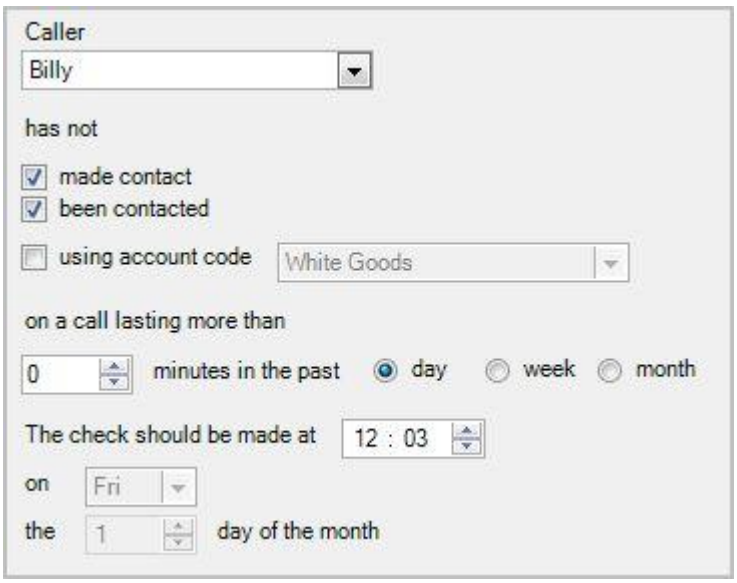


Caller Alarms

Caller alarms allow you to define an alarm that will trigger if a caller has not contacted you or you have not contacted them within a specified time.

The check can be made on a recurring basis as either on a specified day in a week at a specified time or on a specific day in a month at a specified time.

Calls that are too short in length can be excluded, for example if a call was answered by voice mail or answer phone.



Status Alarms

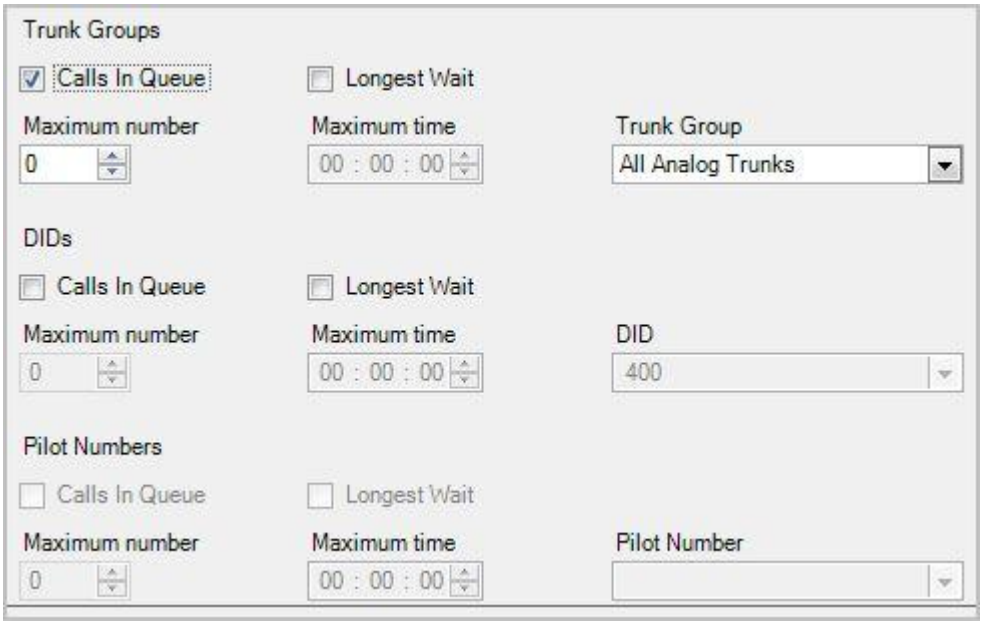
Status alarms are triggered if the number of calls waiting to be answered or the amount of time they have been waiting has exceeded an acceptable limit. They are also triggered if a user has entered any of the rest states too many times between logging on and logging off, or if they stay in a rest state for too long a period.

Status alarms can be set for

- Queue Status
- Longest Wait

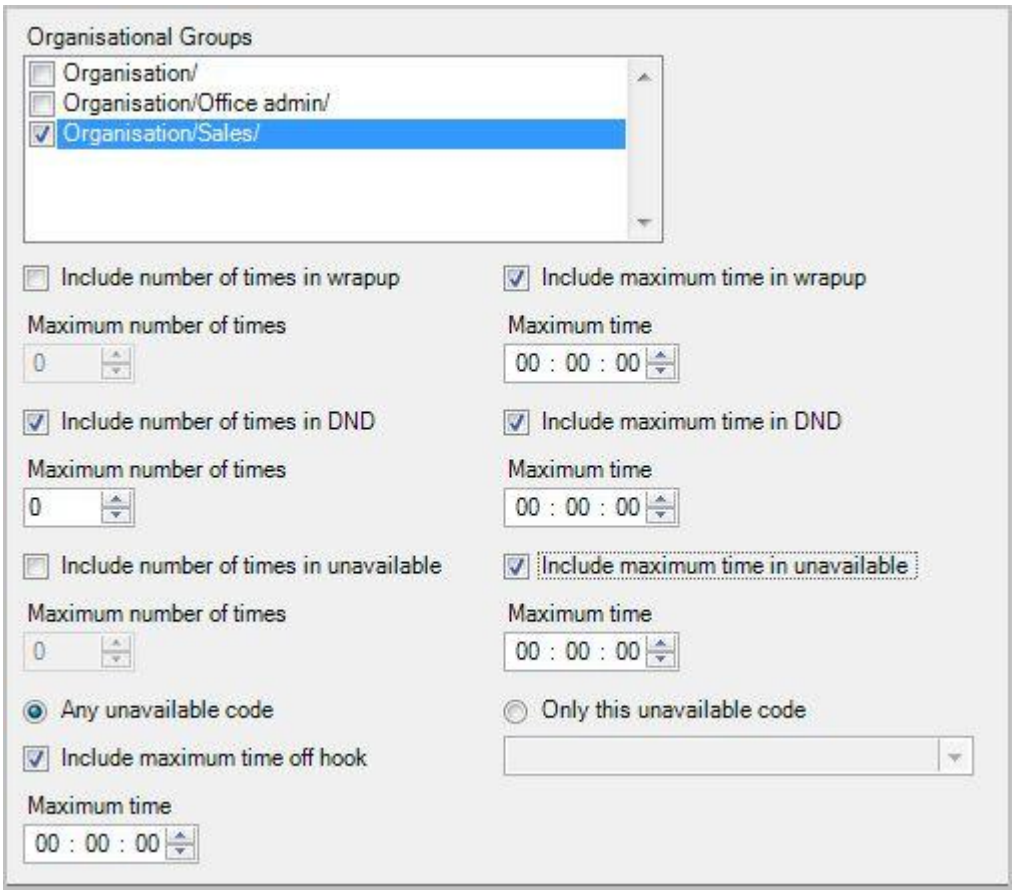
Queue Status Alarm

These alarms can be set to trigger if the number of calls waiting to be answered is too high, or if the wait time of the longest waiting call is too high.



User Status Alarm

A user status alarm can be set to trigger if any of the users in a set of groups has entered any of the rest states (unavailable, wrap up, do not disturb) too many times since the last time they logged on. These alarms can also be set to trigger if the user stays in any of these states for too long a period. Note that the unavailable alarm can either apply to all unavailable states or just the state indicated by the unavailable code. Note that this feature is not available on all PBXs.

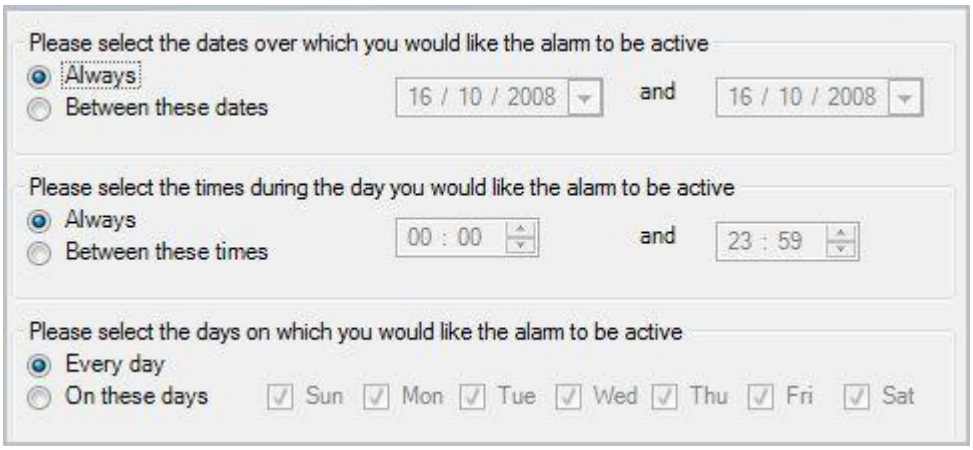


Alarm Schedules

An alarm schedule is a named configuration that allows you to specify when an alarm will be active.

Alarms schedules can be configured to be:

- Active for all dates or for a fixed date range
- Active for all times of the day or for a fixed period of time
- Active for all days of a week or for a selection of days

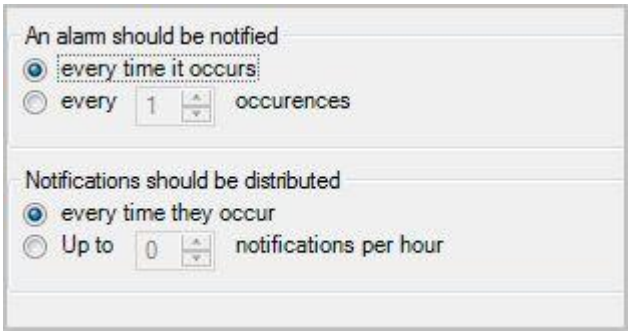


It is very useful to create alarm schedules for out of hours times as well as alarm schedules for working hours. This allows you to configure multiple alarms of the same type but with different schedules so they act differently. For example, you may desire that calls cannot last more than 60 minutes during a week and no outgoing calls out of hours. In this case there would be three alarm schedules created; one that covers the working week 08:00 to 18:00, one that covers out of hours during the week and one that covers weekends. The toll fraud alarm with a 60 minute call duration alarm would be assigned the working week alarm schedule and the toll fraud alarm with a 0 minute call duration would be assigned the out of hours and weekend schedules.

Alarm schedules can also be configured to trigger every time the condition is broken or every 'X' times.

Useful if you have an operating value that is very close to an alarm limit and the figure quite often breaks the limit. These types of limits have worked very successfully when connecting to a PBX that uses a very unstable WAN connection. In this scenario the 'no data from PBX' was set to 10 minutes and on occasions the link would be down for 20 - 30 minutes at a time and unfortunately there was little that could be done about that, by placing an occurrence threshold on the schedule that was set to 4 it meant that if the alarm fired three times then it was connected then the alarm didn't trigger but if it happened four times in a row then the alarm was raised.

Alarm schedules can also be limited to a fixed amount of notifications per hour


An alarm should be notified
every time it occurs
every 1 occurences
Notifications should be distributed
every time they occur
Up to 0 notifications per hour

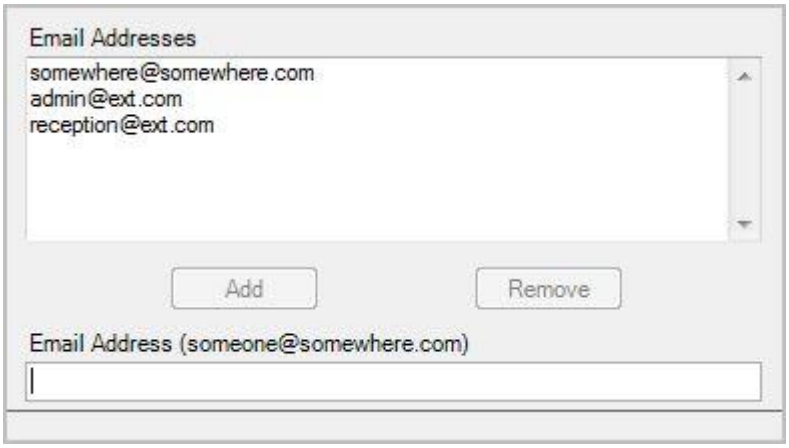
Alarm Distribution Lists

Alarm Distribution Lists determine who should be informed if an alarm condition is broken. There are four mechanisms for informing people that an alarm has been triggered. All running copies of MyCalls client application will be informed by default. See Real Time List Views

The user can then specify one or more of the following types of distribution mechanism

- Email
- Computer
- Process

Email



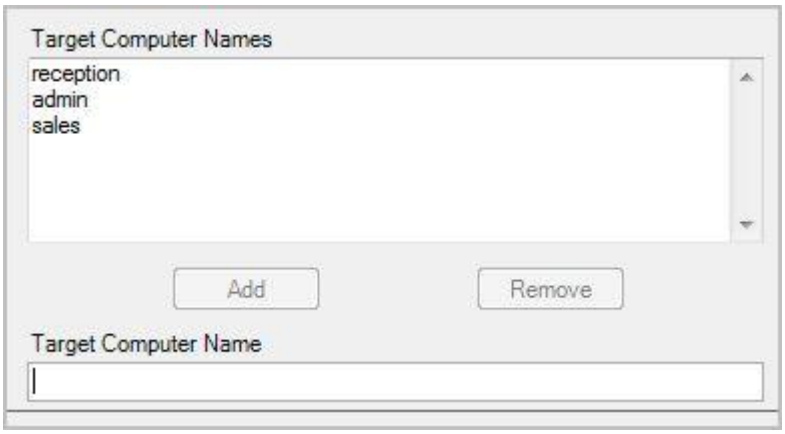
Make sure that you have set up the mail server configuration correctly in the Operational Settings. See Operational Settings

Each email address added will get an email describing the alarm condition that has been broken including the current parameter value and the trigger point value. For example, a system alarm that monitors free disk space and triggers when it is lower than 10GB would send a mail

Subject: MyCalls Real Time Alarm: <Alarm Name>

The free hard disk space on your system drive has fallen below 10GB (7GB)

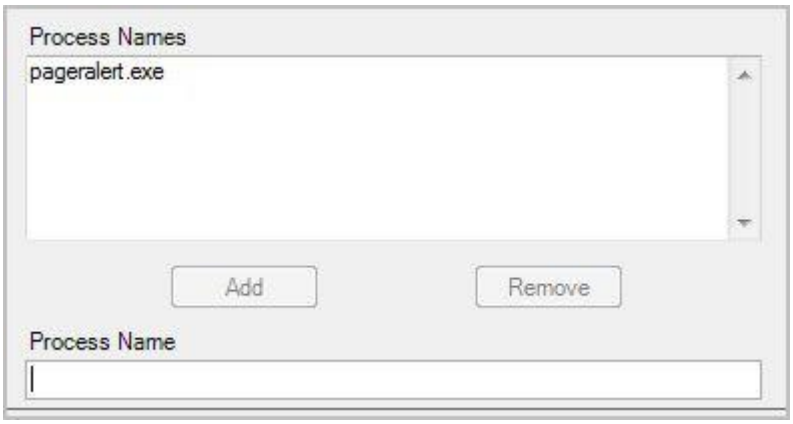
Computer



Each computer name entered will receive a "net send broadcast message" describing the alarm condition that has been broken.

Windows XP Service Pack 2, disables the messenger service by default. If you wish to use this distribution method on your corporate network and you have XP Service Pack 2 installed on any of the computers that will receive the message, you will need to discuss your requirements with your IT department.

Process



Any number of external applications can be invoked when an alarm condition has been broken. The application is passed as a single parameter the string of the alarm message. For the example above the command line for the application would be:

pageralert.exe "The free hard disk space on your system drive has fallen below 10GB (7GB)"

This is very useful if you wish to implement some extra functionality that is not available within MyCalls yourself. Examples of this may be that you run an application that calls a pager or sends an SMS message to a cell phone.

Alarm Severity Levels

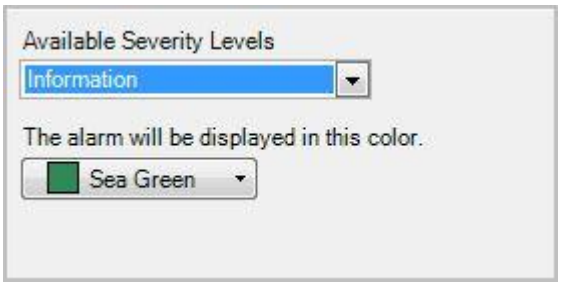
Not all alarms need to be problem alarms that you must act on immediately. It is useful to be given a warning that if this persists then the problem will escalate.

MyCalls supports four levels of alarm severity:

- Information
- Warning
- Severe
- Critical

The meaning of each of these is up to the company. An example of how these may be used is when looking at the Grade of Service. It might be useful to generate an Information alarm if the average Grade of Service drops below 95%, a warning alarm if it drops below 90%, a severe alarm if it drops below 85% and a critical if it drops below 80%.

Each alarm can be configured to do something different. For example, the information alarm may send a message to each of the users. A warning alarm may send an email to a supervisor. A severe alarm may run a report and email it to a supervisor. A critical alarm may run an external program that has a paging interface and pages the alarm details to the President of the company.



Real Time Notifications

You can notify specified users of given call events (Incoming ring, Incoming call, Outgoing call) in real time.

You can either:

Send a message to the configured users by typing in the message contents. You can use special placeholder codes

%1% - Insert the DID present on the call

%2% - Insert the ACD queue the call was directed to

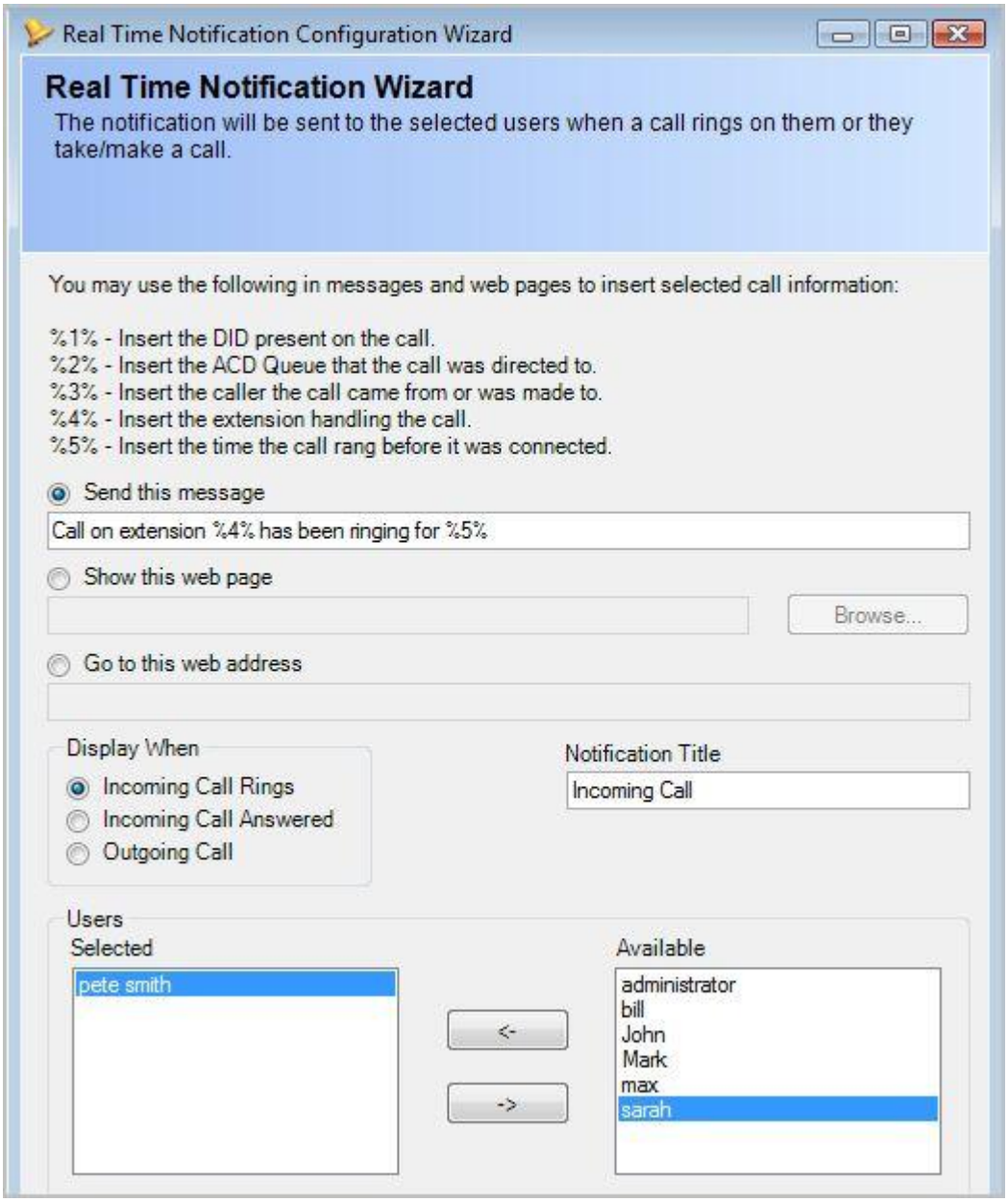
%3% - Insert the caller

%4% - Insert the extension

%5% - Insert the time the call rang before connection

Show a web page: A locally available web page can be invoked in a browser.

Go to this web address: Invoke a web URL for display in a browser.


Real Time Notification Configuration Wizard
Real Time Notification Wizard
The notification will be sent to the selected users when a call rings on them or they take/make a call.
You may use the following in messages and web pages to insert selected call information:
%1% - Insert the DID present on the call.
%2% - Insert the ACD Queue that the call was directed to.
%3% - Insert the caller the call came from or was made to.
%4% - Insert the extension handling the call.
%5% - Insert the time the call rang before it was connected.
Send this message
Call on extension %4% has been ringing for %5%
Show this web page
Browse...
Go to this web address
Display When
Incoming Call Rings
Incoming Call Answered
Outgoing Call
Notification Title
Incoming Call
Users
Selected
pete smith
<-
->
Available
administrator
bill
John
Mark
max
sarah

Chapter 15

Call Costing

Call Costing in MyCalls can seem quite daunting at first. But in fact they can be as simple or as complex as you wish to make them. It simply depends upon the needs of your organization.

The cost of a phone call can be broken down into four parts:

Actual cost = **telephony call cost + fixed costs + handling costs + taxes**

In its simplest form the telephony call cost will be the only one used as the other parts are set to zero if they are not configured.

Profit margins can be added to each call and added to the actual cost of a call. This profit margin can be expressed as either a fixed amount or as a percentage of the actual call cost.

For each call record the costs are broken down into three values, call cost, handling costs (which include the fixed costs) and profit. Reports can then be run and filtered to show the information that matches any of the three value types.

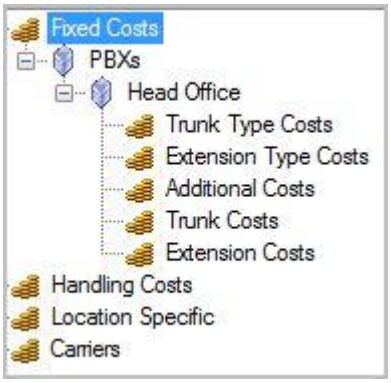
Fixed Costs

Fixed costs are costs that are allocated to capital expenditure items such as extensions and trunks. Each type of extension and trunk can carry its own fixed cost. In addition to the cost types, an individual extension or trunk can be assigned an additional cost ,which can be used to cover any other costs that the type costs does not cover.

Fixed costs are **not** call dependant, as the cost of running an extension or a standing charge on a trunk still applies whether there are any calls on that trunk or extension. As such these do not appear on call detail type reports.

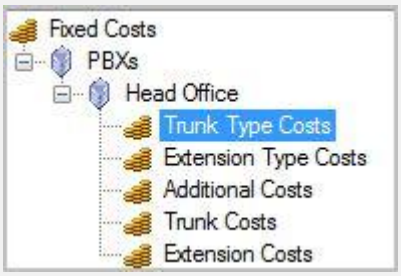
Editing Fixed Trunk Type Costs

Trunk types can be assigned a fixed cost. The amount entered can be specified as an amount for a period defined as hourly, daily, weekly, monthly, quarterly or yearly. The fixed cost amount will always apply regardless of whether or not the trunk received or made any calls and will be shown on reports as a pro-rata figure.



How To: Editing fixed Trunk type costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Then expand the PBX you want to configure costs for.
3) Select the 'Trunk Type Costs' option.



4) Click 'Edit Fixed Trunk Type Costs'

5) You can configure the costs for the different trunk types configured on the system including Analogue, ISDN, Private Wire, TCP/IP, and any unassigned trunks. To configure a cost for a trunk type enter a costing value in the Cost (£) column and then select one of the costing periods from the Cost Period column. Periods selectable are hourly, daily, weekly, monthly, quarterly and yearly.
6) Click 'OK'

Editing Fixed Extension Type Costs

Extension types can be assigned a fixed cost. The amount entered can be specified as an amount for a period defined as hourly, daily, weekly, monthly, quarterly or yearly. The fixed cost amount will always apply regardless of whether or not the extension received or made any calls and will be shown on reports as a pro-rata figure.

How To: Editing fixed Extension type costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise.
3) Click 'Extension Type Costs'
4) Click 'Edit Fixed Extension Type Costs'

5) You can configure the costs for the different extension types configured on the system including Analogue Desk Phones, Analogue System Phones, Analogue User Phones, Announcement Ports, Auto Attendant, Cordless Phones, Digital Desk Phones, IP Desk Phones, Non PBX Phones, Operator Consoles, Voicemail and Unassigned extensions.
6) To configure a cost for an extension type, enter a costing value in the Cost (£) column and then select one of the costing periods from the Cost Period column. Periods selectable are hourly, daily, weekly, monthly, quarterly and yearly.
7) Click 'OK'

Editing fixed Additional Costs

Fixed additional costs are any other user configured cost that may apply to a trunk or extension device types. This could be to include premiums for feature phones over normal phones for example. Additional costs must be configured with a unique name. You can enter negative additional costs that will be subtracted from any other costs. The amount entered can be specified as an amount for a period defined as hourly, daily, weekly, monthly, quarterly or yearly.

How To: Editing fixed additional costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Fixed Costs category' in the left pane of the window. This will display all available PBXs in your enterprise. Then expand the PBX you want to configure costs for.
3) Click the 'Additional Type Costs' option.
4) Click 'Edit Additional Costs'
5) This window will list all existing additional fixed costs in the system. To add a new additional cost click 'Add'.
6) Enter a unique name at the next screen for the new additional cost item.
7) The new additional costing item will appear in the listing of cost items.

8) Enter a costing value in the Cost (£) column and select one of the costing periods from the Cost Period column. Periods selectable are hourly, daily, weekly, monthly, quarterly and yearly.
9) You can continue to add further additional costs or edit the existing costs.
10) To remove an additional cost item you have created, select the item from the list of additional costs and click 'Remove'.
11) Click 'OK'

Editing Fixed Trunk Costs

Fixed trunk costs are the total cost associated with the trunk's type and one other user defined additional cost if you wish to apply it also to the overall costing of the trunk.

How To: Editing fixed Trunk costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure costs for.
3) Click the 'Trunk Costs' option.
4) Click 'Edit Fixed Trunk Costs' window.

Number	Name	Type	Additional Cost
001	001	Unassigned	None
002	002	Unassigned	None
005	005	Unassigned	None
006	006	Unassigned	None
007	007	Unassigned	None
015	015	Unassigned	None

5) This window will list all trunk line numbers along with their, names and their defined trunk type as set through the telephone configuration or auto learned from the PBX. You can select one of the additional costs from the drop down list which can be accessed for each trunk in the Additional Cost column. These will need to have been previously created through the Additional Costs under Fixed Costs.
6) Click 'OK'

Editing Fixed Extension Costs

Fixed extension costs are the total cost associated with the extension type and one other user defined additional cost if you wish to apply it also to the overall costing of the extension. For example you could put in an additional cost which could be applied to desk phones with a larger screen.

How To: Editing fixed Extension costs

1) Click the 'Costs' option from the Configure menu or clicking the icon on the toolbar.
2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise.
3) Click 'Extension Costs'
4) Click 'Edit Fixed Extension Costs'

Number	Name	Type	Additional Cost
208	208	Unassigned	None
235	Reception	Digital Desk Phone	None
236	236	Unassigned	None
237	237	Unassigned	None
300	300	Unassigned	None
301	301	Unassigned	None
302	302	Unassigned	None
304	304	Unassigned	None

5) This window will list all extension numbers along with their, names and their defined device type as set through the telephone configuration or auto learned from the PBX. You can select one of the additional costs from the drop down list which can be accessed for each extension in the Additional Cost column. These will need to have been previously created through the Additional Costs under Fixed Costs.
6) Click 'OK'

Handling Costs

Handling Costs are costs that can be attributed to a call that are based on the labour costs involved in handling it. It is also possible to add further handling costs for each account code, DID or pilot number. These handling costs allow calls taken on different account codes, DIDs or pilot numbers to be charged differently, which can be useful if you operate a bureau service for other companies and wish to charge your customers differently.

The labour costs involved with handling calls still apply to incoming calls as well as outgoing calls. The handling costs can be configured to include incoming calls as well as outgoing calls. This can be useful to do when you wish to see the how much it is actually costing you for your staff to take personal calls.

Editing User Costs

User Costs are the labour costs involved when employing an individual user. Each user can be configured to have an associated user cost.

Applying a user role of "user" or "supervisor" to most users would be very beneficial if user costs are defined, as these roles do not allow users to view or edit the configuration and hence see the handling rates entered for each person.

How To: Editing User costs

1) Select the 'Costs' option from the Configure menu or clicking the icon on the toolbar.
2) Expand the 'Handling Costs' category

3) Click 'User Costs'
4) Click 'Edit User Handling Costs'

Number	Job Title	Organisation Group	Hourly Cost (£)
administrator		Sales	15.00
John	Sales manager	Sales	20.00
pete smith		Sales	12.50
Mark	Snr sales Manager	Office admin	28.00
max		Office admin	8.00
bill	personal assistant	Customer service	12.00
sarah	admin officer	Customer service	10.00

5) This window will list all users along with their job titles and organisation groups as set through the organisation setup. In the Hourly Cost (£) column you can assign per user a pro-rata hourly rate. You can copy a value to multiple users by right clicking the mouse button and copying, then selecting and pasting onto the other users.

6) Click 'OK'

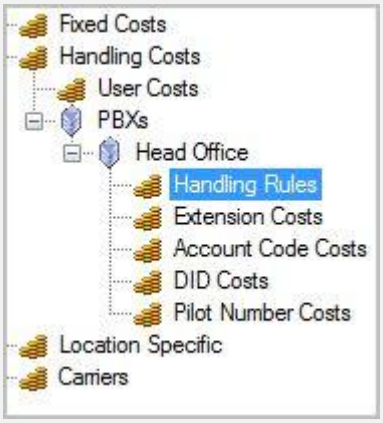
Editing Handling Rules

Handling Rules are used to specify when handling costs are applied. You can choose to apply configured handling costs to incoming answered calls, outgoing calls or both.

How To: Editing Handling rules

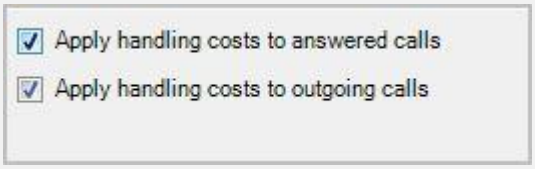
1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar.

2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the rules for.



3) Click the 'Handling Rules' option.

4) Click 'Edit User Handling Rules'



5) This window will give you the option to select and apply handling costs to incoming answered calls, outgoing calls or both. By default both options are enabled but to de select an option remove the tick in the option box to the left of the text.

6) Click 'OK'

Editing Extension Handling Costs

Extension handling costs are used to specify pro-rata hourly rates that will be applied and charged to an extension whilst handling a call.

How To: Editing Extension handling costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
3) Click the 'Extension Costs' option.
4) Click 'Edit Extension Handling Costs'

Number	Name	Type	Group	Hourly Cost (£)
208	208	Unassigned	None	5.50
235	Reception	Digital Desk Phone	Sales	7.50
236	236	Unassigned	None	8.40
237	237	Unassigned	None	8.40
300	Mark	Digital Desk Phone	Sales	12.00
301	Max	Digital Desk Phone	Reception	6.75

5) This window will list all extension numbers along with their, extension names, defined device type and extension group their associated with, as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per extension a pro-rata hourly rate. You can copy a value to multiple extensions by right clicking the mouse button and copying, then selecting and pasting onto the other extensions.
6) Click 'OK'

Editing Account Code Handling Costs

Account code handling costs are used to specify pro-rata hourly rates that will be applied and charged for an account code whilst handling a call.

How To: Editing Account Code handling costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
3) Click the 'Account Code Costs' option.
4) Click 'Edit Account Code Handling Costs'

Number	Name	Group	Hourly Cost (£)
110	White Goods	None	0.00
111	TV sales	None	0.00
112	Book Sales	None	0.00

5) This window will list all account codes along with their, account code names, and their account code groups as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per account code a pro-rata hourly rate. You can copy a value to multiple account codes by right clicking the mouse button and copying, then selecting and pasting onto the other account codes.
6) Click 'OK'

Editing DID Handling Costs

DID handling costs are used to specify pro-rata hourly rates that will be applied and charged for a DID number whilst handling a call.

How To: Editing DID handling costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
3) Click the 'DID Costs option'.
4) Click 'Edit DID Handling Costs'

Number	Name	Group	Hourly Cost (£)
400	400	None	0.00
401	401	None	0.00
001	001	None	0.00
3343	3343	None	0.00

5) This window will list all DID numbers along with their, DID names, and their DID groups as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per DID a pro-rata hourly rate. You can copy a value to multiple DIDs by right clicking the mouse button and copying, then selecting and pasting onto the other DIDs.
6) Click 'OK'

Editing Pilot Number Handling Costs

Pilot number handling costs are used to specify pro-rata hourly rates that will be applied and charged to a pilot number whilst handling a call.

How To: Editing Pilot Number handling costs

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
3) Click 'Pilot Number Costs' option
4) Click 'Edit Pilot Number Handling Costs'
5) This window will list all pilot numbers along with their, pilot name, pilot type, and their associated pilot number group as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per pilot number a pro-rata hourly rate. You can copy a value to multiple pilot numbers by right clicking the mouse button and copying, then selecting and pasting onto the other pilot numbers.
6) Click 'OK'

Location Specific Costs

Location Specific Costs are additional costs that are dependent on the location of the PBX where the outgoing calls will be made from. These include the following:

- Local Area Codes
- Carrier Associations
- Profit Margins
- Taxes

Edit Local Area Codes

Local Area Codes are the area codes that will incur a local rate call charge. They are dependent on the location of the PBX, and by default are governed by the area code entered for the PBX when it was created.

The system will automatically assign the local area codes for you when the PBX is created. If, however, these are incorrect for you then they can easily be modified manually.

Area codes must be specified without the trunk access code.

The list of local area codes can also be imported from a file, which can be easier if you have the information available from another source. The format of the file is very straight forward, one area code on one line followed by carriage return

1270

1260

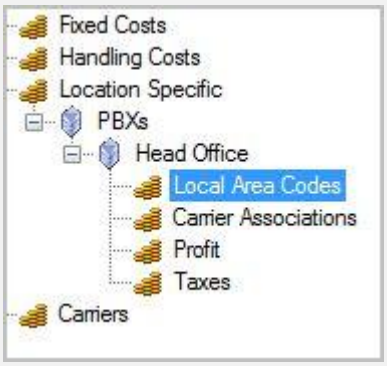
1606

United Kingdom Local Area Codes

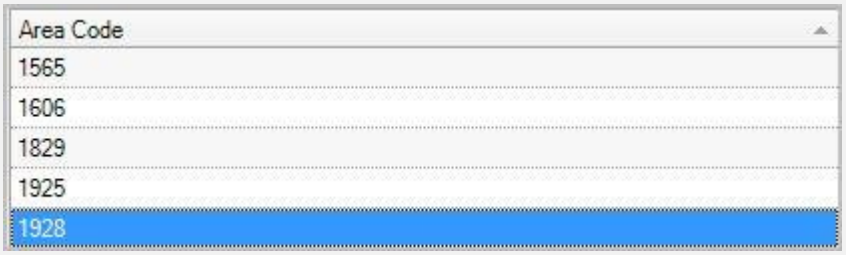
The United Kingdom defines its local area codes by the area codes that are adjacent to the one that is specified for the area code of the exchange the PBX is connected to.

How To: Editing Local Area codes

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.



3) Click the 'Local Area Codes' option
4) Click 'Edit Local Area Codes'



5) The displayed area codes are those that can be dialled from the location of the PBX incurring just a local charge. You can add a new local number by clicking 'Add' or import a local number by clicking 'Import'
6) Click 'OK'

Edit Carrier Associations

Carrier associations are the rules by which the correct carrier for each outgoing call type is determined. A carrier can be directly specified which means that the same carrier will always be used for those types of call, or least cost routing could be specified which means that the carrier will be automatically selected using the least cost routing digits. If least cost routing is specified as the carrier but no match is found in the least cost routing numbers then the call will not be costed.

How To: Editing Carrier associations

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.

3) Click 'Carrier Associations' option.
4) Click 'Edit Carrier Associations'

Call Type	Carrier
Local	BT Business
National	BT Business
International	BT Business
Special Numbers	BT Business
Mobile Numbers	BT Business

5) This window will list all the call types used by the system and for each call type the carrier being used to provide the costing information. You can select pre-installed carrier information which by default will include BT Business and Least Cost Routing. If additional carriers are required then they will have to be configured through the carrier setup screen.
6) Click 'OK'

Edit Profit Margins

A profit margin can be applied to a call for each class of call type. The profit margin is calculated after the call costs and handling costs have been applied. The margin can be specified as either a fixed amount or as a percentage of the total cost.

How To: Editing profit margins

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
3) Click the 'Profit' option.
4) Click 'Edit Profit Margins'

Call Type	Profit	Apply as
Incoming	8.00	%
Free	0.00	%
Local	7.50	%

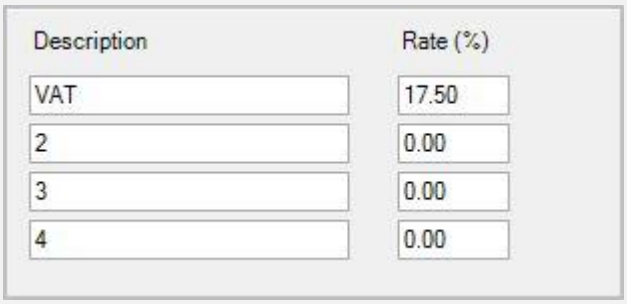
5) This window will list all the call types used by the system and for each call type you can enter a 'Profit' value in the Profit column. Then you can select from the 'Apply as' column whether you want to apply the profit as a percentage of the calls total cost or as a fixed amount.
6) Click 'OK'

Edit Taxes

The taxes that are applied to calls are intended to be used when invoice styled reports are generated to be used to bill external customers. The cost of a call that is subject to taxes is the **call cost + handling cost + profit.** Up to four separate taxes can be defined and are added together and applied to all calls.

How To: Editing Taxes

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
3) Click the 'Taxes' option.
4) Click 'Edit Taxes'



5) This window will give you four entries to define four separate taxes. You can provide a description for each tax entry and also the rate of taxation as a percentage.
6) Click 'OK'

Carriers

Carriers are also known as operators, and are the telephone companies that provide the telephone service to your company. It is possible to have multiple carriers supply a single company. Each carrier is responsible for connecting one or more types of calls. It is quite common to have one carrier supply your local calls and another that supplies your national calls.

If when you make a call you do not prefix the number you are dialling with another series of digits, then you will be using Carrier Pre-Select where the carrier is set for that type of call at the exchange.

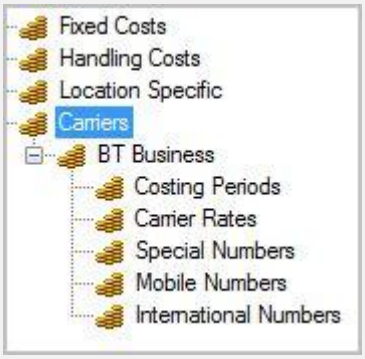
If you prefix the number you are dialling with another series of digits, then you will most likely be using Least Cost Routing. It is possible to have several Least Cost Routing carriers handle calls for the same call type. The carrier used is determined by the prefix entered before the number.

MyCalls supports both Carrier Pre-Select and Least Cost Routing, and any number of carriers can be configured.

Add a New Carrier

How To: Add a new Carrier

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Select the 'Carriers' option.



3) Click 'Add Carrier' in the right pane.

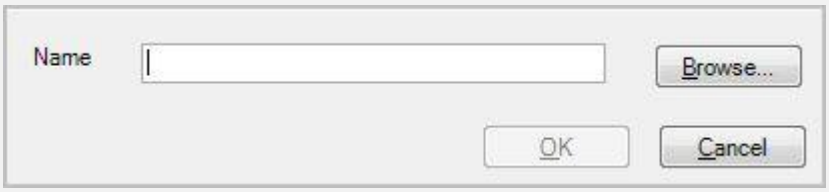
4) In the window that appears you can enter a name for the carrier, the country and the least cost routing digits. You can enter multiple sets of least cost routing digits by separating with a comma and leaving no spaces.
5) Click 'OK'

Import a Carriers Settings

You can use the import carrier wizard to import a carrier and its settings from a previously exported or created carrier file.

How To: Import a Carriers setting

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Select the 'Carriers' option.
3) Click 'Import Carrier' in the right pane



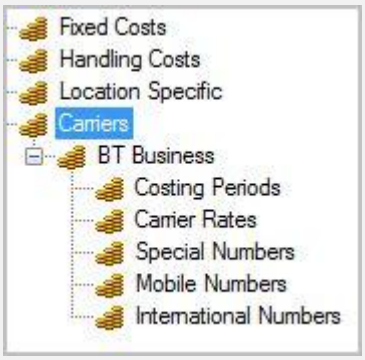
4) You will be presented with a screen that allows you to browse to the carrier configuration file saved in a location on the local computer or a network location. If the carrier details in the file already exist the carrier in MyCalls will be updated otherwise a new carrier will be created and listed under the Carriers area of the Configure Costs window.
5) Click 'OK'

Edit an Existing Carrier

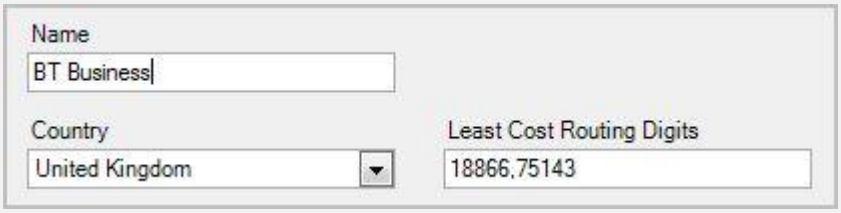
You can use the edit carrier wizard to modify the country the carrier is in and the least cost routing digits the carrier uses.

How To: Editing an existing Carrier

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Click 'Carriers'
3) Select the carrier you wish to edit e.g. BT Business



4) Click 'Edit Carrier' in the right pane.



5) You can change the name, modify the country the carrier is in and modify the least cost routing digits the carrier uses. You can enter multiple sets of least cost routing digits by separating them with a comma, but leaving no spaces.
6) Click 'OK'

Delete a Carrier

You can delete an existing carrier at any time by following this procedure:

How To: Delete a Carrier

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Carriers' option and select the carrier name of the configuration you want to delete.
3) Click 'Delete Carrier'
4) You will be asked to confirm deletion.
5) Click 'Yes' to confirm, 'No' to cancel

Duplicate a Carrier

You can duplicate an existing carrier in order to customise its configuration settings but leaving the original configuration as it is.

How To: Duplicate a Carrier

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Carriers' option and select the carrier name of the configuration you want to duplicate.
3) Click 'Duplicate Carrier'
4) Click 'OK'

Carrier Costing Periods

Carriers offer different tariffs for calls dependent on the time of day the call was made. The number of time bands provided by a carrier varies from carrier to carrier though there is usually some form of daytime, evening and weekend rate. The daytime rate tends to be more expensive as that is when most business calls are made.

The time bands used by carriers never overlap and together they must cover a complete week.

MyCalls can have any number of time bands for a carrier. The system will automatically check if there are any overlapping time bands and flag an error if any overlap.

How To: Editing Costing Periods

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Carriers' option and select the 'Costing Periods' option under the carrier you want to configure the settings for.
3) Click 'Edit Costing Periods'

Name	Interval Start	Interval End	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Daytime	08:00:00	17:59:59	☑	☑	☑	☑	☑	☐	☐
Evening	18:00:00	23:59:59	☑	☑	☑	☑	☑	☐	☐
Weekend	00:00:00	23:59:59	☐	☐	☐	☐	☐	☑	☑

4) In this window by default you will have periods pre-defined for Daytime, Evening, Morning and Weekend. You can modify the values for each period including the period start time, period end time and the days the costing period will apply on. To change the days, click the box in the column of the day you want to configure and if a tick is filled then the day is enabled otherwise the day is excluded from the period.
5) You can add further costing periods by clicking the 'Add' button which will prompt you to provide a unique name for the new period.

6) Enter the new costing period name and click 'OK'. The new costing period will now appear in the Editing Costing Period window for you to configure the period values as explained earlier.

Name	Interval Start	Interval End	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Daytime	08:00:00	17:59:59	☑	☑	☑	☑	☑	☐	☐
Evening	18:00:00	23:59:59	☑	☑	☑	☑	☑	☐	☐
Morning	00:00:00	07:59:59	☑	☑	☑	☑	☑	☐	☐
Weekend	00:00:00	23:59:59	☐	☐	☐	☐	☐	☑	☑

7) If you want to remove a costing period then simply select it from the list to highlight it and click 'Remove'. You will not be prompted to confirm and the costing period will be deleted from the system
8) Click 'OK'

Carrier Rates

Carrier Rates are the calculations used by carriers to determine the cost of a call.

MyCalls has two types of carrier rates, System and User defined. The system defined rates are Local, National, International and Special Numbers. These rates cannot be deleted and by default, calls will be costed according to these rates when a carrier is added. It is quite rare that carriers will have such a simplistic costing structure and the user is generally required to create rates that match those provided by their carrier.

When adding a new carrier rate, make sure the costs have been entered into all of the periods, otherwise calls in those periods will be costed at nothing.

If the tariff has only one price and it does not vary by the length of the call then you must use the 'There after' charging period.

How To: Add or Import a new Carrier Rate

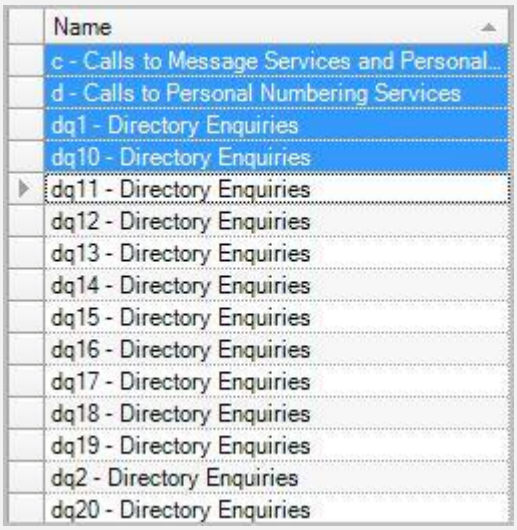
1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Carriers' option and select the 'Carrier Rates' option under the carrier you want to configure the settings for.
3) Click 'Add or Edit Carrier Rates'

Name
Period
Initial Cost (£)
Min Cost (£)
Thereafter Cost (£)
Thereafter Rate
Thereafter Interval
c - Calls to... Daytime 0.0000 0.0420 0.1070 00:01:00 Edit...
c - Calls to... Evening 0.0000 0.0420 0.0620 00:01:00 Edit...
c - Calls to... Morning 0.0000 0.0420 0.0620 00:01:00 Edit...
c - Calls to... Weekend 0.0000 0.0420 0.0327 00:01:00 Edit...
d - Calls to... Daytime 0.0000 0.0420 0.1422 00:01:00 Edit...
d - Calls to... Evening 0.0000 0.0420 0.0838 00:01:00 Edit...
d - Calls to... Morning 0.0000 0.0420 0.0838 00:01:00 Edit...
d - Calls to... Weekend 0.0000 0.0420 0.0838 00:01:00 Edit...
Add new rate...
Import...

4) To add, click 'Add' and enter a name for the carrier rate
5) To Import, click 'Import' and select the file you wish to import
6) Click 'OK'

How To: Delete a Carrier Rate

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar
2) Expand the 'Carriers' option and select the carrier name of the configuration you want to delete
3) Select the 'Carrier Rates' option under the carrier you want to configure the settings for.
4) Click 'Delete Carrier Rates'


Name
c - Calls to Message Services and Personal...
d - Calls to Personal Numbering Services
dq1 - Directory Enquiries
dq10 - Directory Enquiries
dq11 - Directory Enquiries
dq12 - Directory Enquiries
dq13 - Directory Enquiries
dq14 - Directory Enquiries
dq15 - Directory Enquiries
dq16 - Directory Enquiries
dq17 - Directory Enquiries
dq18 - Directory Enquiries
dq19 - Directory Enquiries
dq2 - Directory Enquiries
dq20 - Directory Enquiries

5) Select the carrier rates you wish to delete. You can select multiple carrier rates by holding down control (Ctrl) while you select with the mouse.
6) Click 'OK'

How To: Edit Carrier Rates

1) Select the 'Costs' option from the Configure menu or click the icon on the toolbar

2) Expand the 'Carriers' option and select the carrier name of the configuration you want to edit

3) Select the 'Carrier Rates' option

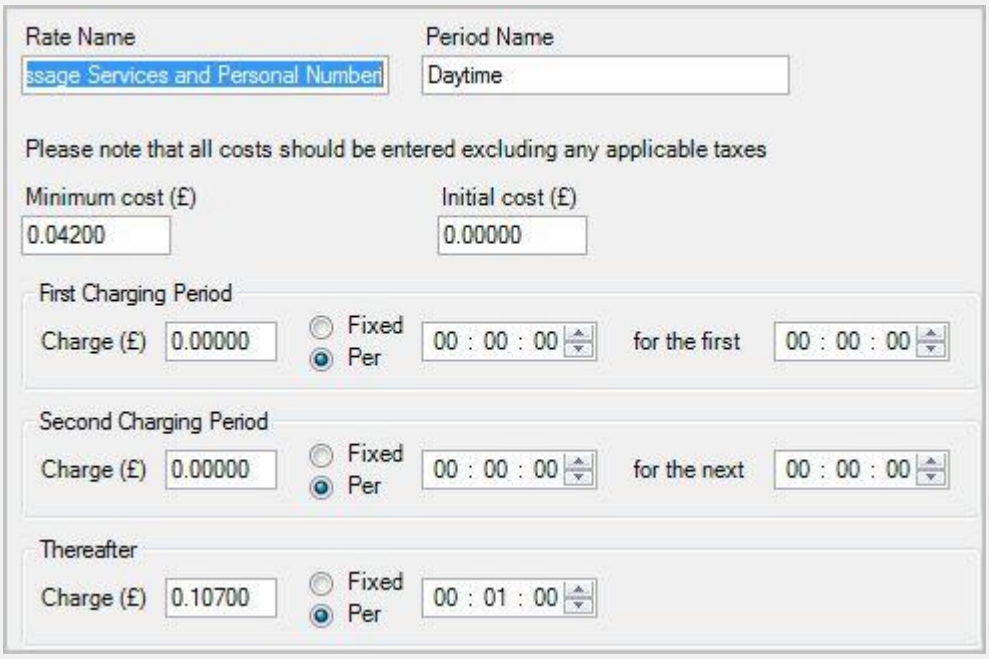
4) Click 'Add or Edit Carrier Rates'

Name	Period	Initial Cost (£)	Min Cost (£)	Thereafter Cost (£)	Thereafter Rate	Thereafter Interval	
c - Calls to...	Daytime	0.0000	0.0420	0.1070	☑	00:01:00	Edit...
c - Calls to...	Evening	0.0000	0.0420	0.0620	☑	00:01:00	Edit...
c - Calls to...	Morning	0.0000	0.0420	0.0620	☑	00:01:00	Edit...
c - Calls to...	Weekend	0.0000	0.0420	0.0327	☑	00:01:00	Edit...
d - Calls to...	Daytime	0.0000	0.0420	0.1422	☑	00:01:00	Edit...

5) To edit the carrier rate you can either select the row (as shown above) and edit by selecting each column and altering the data.

6) Alternatively, you can click the 'Edit...' button to the right of the carrier rate you want to edit.

7) The 'edit a carrier rate' window appears, where you can alter the rate name, period name, minimum costs, initial cost, first and second charging periods and thereafter charging periods. You can select whether the charges are fixed or not.



8) Click 'OK'

Chapter 16

Agent Control

Agent Control and Automatic Call Distribution (ACD)

Agent-Control allows you to manage which agents are made available to handle incoming calls, from ACD queues within your organisation.

Agent Control and ACD will enable you to do the following:

- To ensure calls are distributed fairly, so that no individual is overloaded whilst others are kept idle
- Allow members of a lightly loaded department can assist a heavily loaded department on demand
- Agents can be empowered to log onto call queues as necessary
- Reasons and times when agents are unavailable can be recorded
- Completion Codes can be entered after each call to identify the purpose and actions taken for each call.

Users can be grouped together according to their primary skills and automatically logged on to the appropriate queues when required

Because call volumes can vary enormously throughout the day, you will need to be able to respond quickly to fluctuations in requirements. Agent Control is one way you can do this directly from your MyCalls screen.

Note: The use of completion codes does not require the user to be logged into ACD.

Call Queues

Call queues are queues within the PBX switch which can hold incoming calls.

Prior to being placed in a queue a call may go via one of the following routes.

- The call is answered by an auto-attendant which will direct the call to the most appropriate queue by asking the caller to enter a series of digits from the handset
- The caller may have dialled a DID number which is automatically associated with a call queue
- A live receptionist may route your call to a queue using a Pilot number

A queue can be in the form of either a Hunt-Group or an ACD queue.

Hunt groups are a defined set of extensions which will respond to calls in either a collective ring (all phones ringing simultaneously) or a sequential ring (each phone rings in turn). Collective rings can

lead to indecisiveness if more than one agent is available. Sequential rings can lead to longer wait times as the call has to wait at each extension in the group in turn.

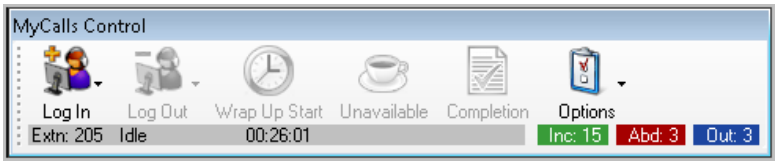
ACD queues are more sophisticated and allow calls to be routed according to a set of well defined rules. In general the rules will route calls to an appropriate extension based on who has been idle the longest within the group. Each ACD group consists of a number of agents who can log on and off the queues as required. In addition agents can be allowed to log onto more than one queue at a time and can enter a variety of states such as unavailable or wrap-up when they are busy with other activities.

MyCalls manages Agent control at various levels

- Linking users to queues appropriate to the user's skill-set or other criteria
- Associating a user with a pin code
- Associating user's within an ACD group with a set of unavailable codes
- Providing real time information regarding queue status
- Reporting on performance

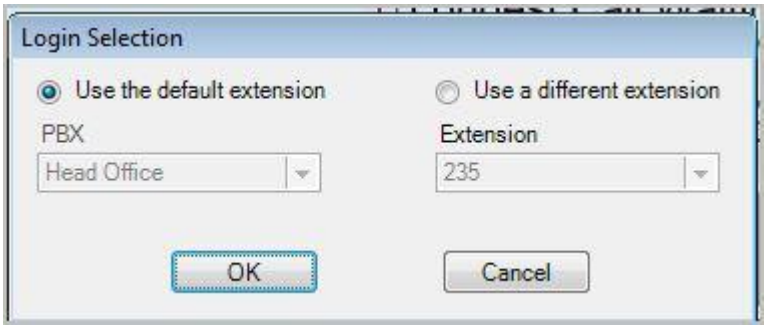
Operating Agent Control

The agent control toolbar is displayed as a separate movable toolbar and provides the following functions.



Login: Allows a user to login to one or more queues. The queues available from the drop down menu will show the queues configured for that user. The user can elect to login to specific queues or all login queues marked as primary queues for Agent Control group to which a user belongs.

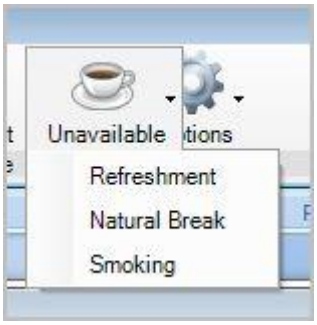
When a user logs in they will be prompted for the number of the extension which thay are currently using. This allows the ACD system to correctly locate the user when routing calls.



Logout: logout of one or more queues.

Wrap-up Start/Stop: A user can enter wrap-up or exit wrap-up state. The icon toggles state when clicked.

Unavailable: A user can specify that they are unavailable and select an unavailable code

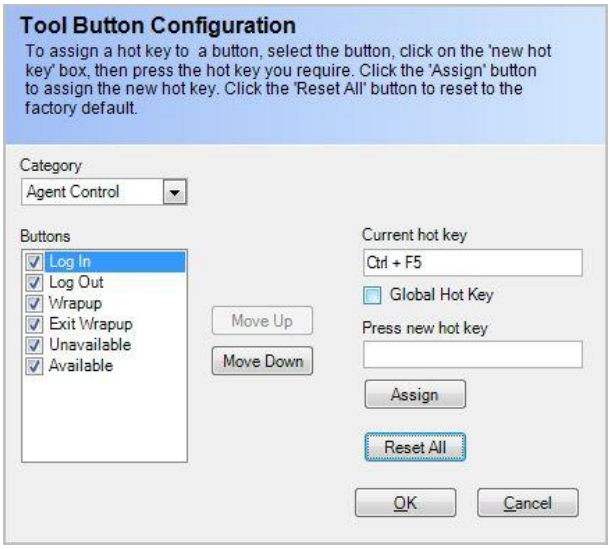


Completion Code Entry: A user can enter a completion code or codes for the previous call. This is only available between the end of a call and the end of the next call to the same extension.

For more details on using the completion codes see the Using Completion Codes section

Options: Options to set the following:

- Lock Toolbar
- Always keep the toolbar on top of other windows
- Set visible tool-buttons and shortcut keys


Tool Button Configuration
To assign a hot key to a button, select the button, click on the 'new hot key' box, then press the hot key you require. Click the 'Assign' button to assign the new hot key. Click the 'Reset All' button to reset to the factory default.
Category
Agent Control
Buttons
Log In
Log Out
Wrapup
Exit Wrapup
Unavailable
Available
Move Up
Move Down
Current hot key
Ctrl + F5
Global Hot Key
Press new hot key
Assign
Reset All
OK
Cancel

Viewing Agent activity

Prerequisites: For the queue status described below to show any activity you will need to have configured users for Agent control and users must have logged in. For our example we have created an ACD queue called sales and allocated two users to that queue Mark and John. See later in this section for details regarding configuration of the queues and users.

To view queue activity you will need to configure a real time queue status window. Full details of this are described in the Real time status section of the manual but a summary is described here.

From the MyCalls menu select View->Real time information->Real time status->DID Status->Queue Status

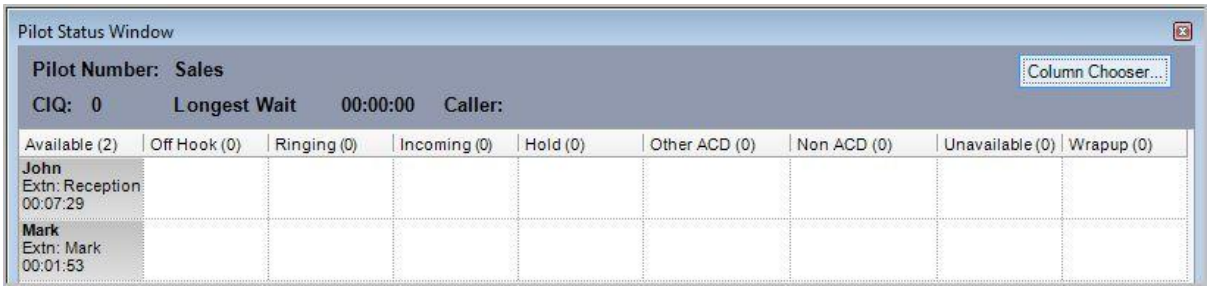
Select the 'Detailed' view and click 'OK'

A queue status window will be displayed on the screen showing the current status of any users logged into the queue.

Call States

As calls are made to the incoming pilot number the activity of the users can be viewed. The possible states are

Available

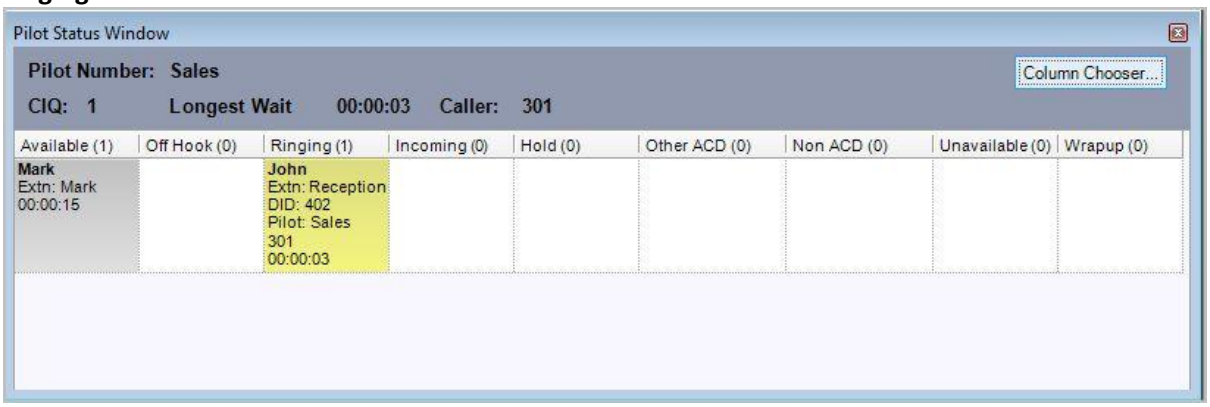


Off Hook

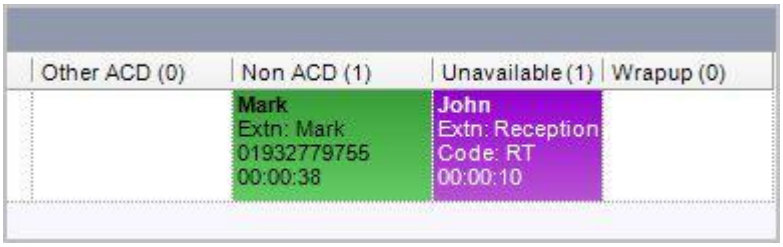
Hold

Incoming

Ringing

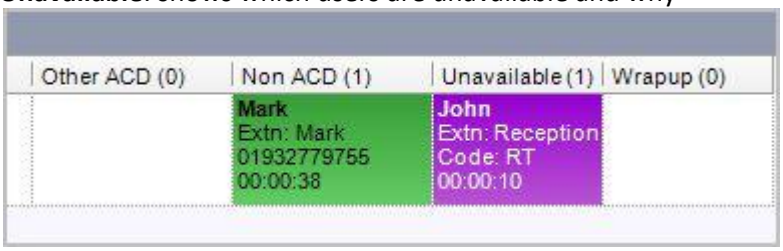


Other ACD: A user is on a call from another ACD queue than the one which You are logged into. This is useful if you as a department manager wants to know that a user is busy on another call and that the calling party is legitimate



Non ACD: this could be an intercom call or a personal call etc

Unavailable: shows which users are unavailable and why



Wrap up: The user has finished a call and is wrapping up the call details

Agent control configuration

There are several steps to configuring ACD and Agent control

1. **Set up users**: Users will need to be assigned a default extension, and a user role (See user configuration for details)
2. **Assign the users an ACD login/pin code**: This allows the users to log in to the phone system via MyCalls and makes them available to answer calls. The Login code is an arbitrary code assigned to each user which informs the phone system to make a logical link between a user and their current extension. This means that when a queued call is to be routed the users associated with that queue can be correctly located.
3. **Configure ACD queues:** Via the Pilot number configuration
4. **Configure Unavailable codes**: Identifies a set of unavailable codes which can then be assigned to an agent control group. Only available users can take calls therefore the ACD system needs to be aware if users are available or not at any time.

5. **Configure the Agent control**: Assign users and ACD queues to Agent control groups so that the users can be associated with a given queue or set of queues. This allows a given user to automatically login to one or more queues
6. **Configure a real time status window:** To view the queue status as described in the previous section

Set up users

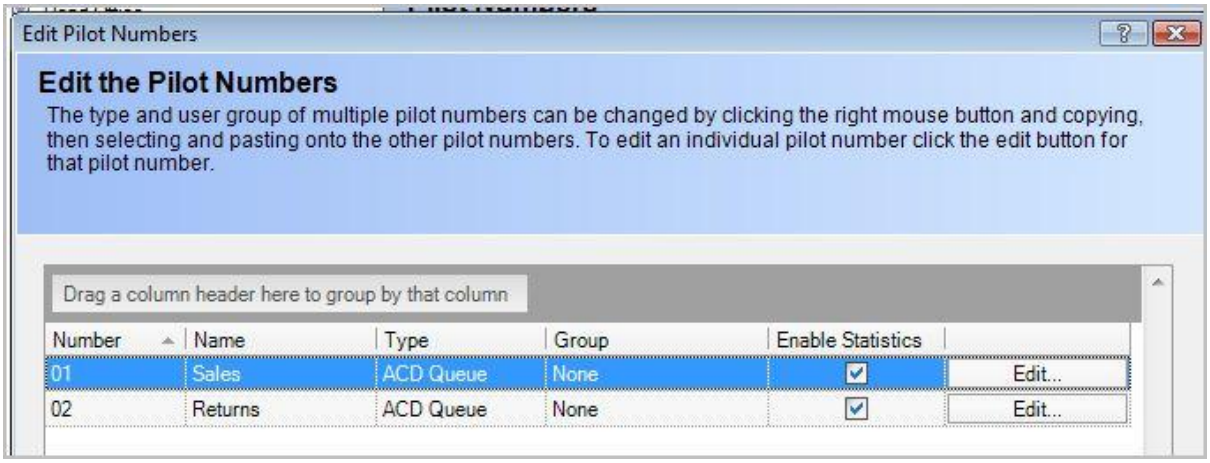
Users are created within the MyCalls environment and you must be logged in as a user in order to run the MyCalls application. Users can be given different roles and privileges within the application. For more detailed information about users see the relevant section of this manual.

Dynamically associating a User with an extension

In order for staff members to log into and out of ACD queues we must relate our staff members (users) with the extension that they are currently using. Relating a user to an extension is accomplished via the login/pin code configuration which is also covered in the Device Configuration section in this manual.

Creating ACD queues using Pilot numbers

Within MyCalls Pilot numbers and ACD queues are effectively synonymous. In order to define an ACD queue we create a Pilot number and assign it a type of 'ACD Queue'. The screenshot here shows 2 queues have been created, 'sales' and 'returns'.


Edit Pilot Numbers
Edit the Pilot Numbers
The type and user group of multiple pilot numbers can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other pilot numbers. To edit an individual pilot number click the edit button for that pilot number.
Drag a column header here to group by that column
Number
Name
Type
Group
Enable Statistics
01
Sales
ACD Queue
None
Edit...
02
Returns
ACD Queue
None
Edit...

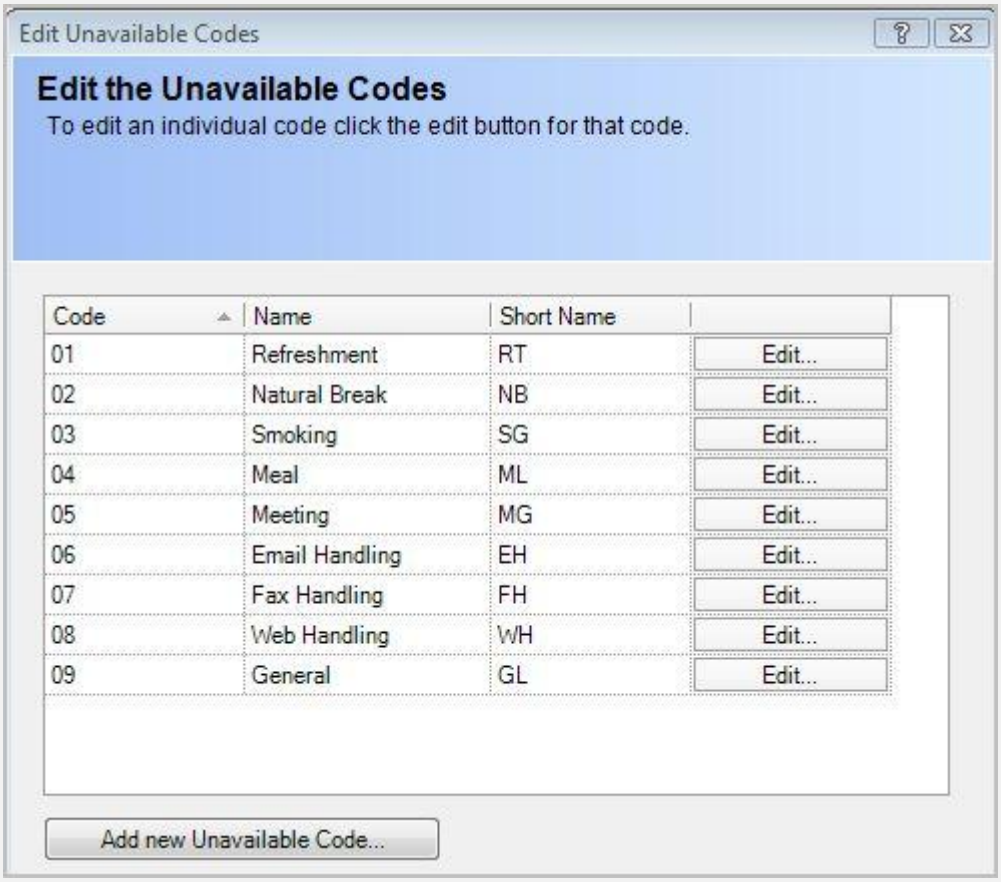
Unavailable Code configuration

There are two areas where Unavailable codes are configured. Firstly you need to define the Unavailable Codes. In order to use these codes you will need to define sets of Unavailable Codes which can be applied to different groups of ACD users.

How To: Creating/Editing Unavailable Codes

1) Select Configure->Telephone System->Unavailable codes from the menu

2) Select 'Create or Edit unavailable Codes'


Edit Unavailable Codes
Edit the Unavailable Codes
To edit an individual code click the edit button for that code.
Code
Name
Short Name
01 Refreshment RT Edit...
02 Natural Break NB Edit...
03 Smoking SG Edit...
04 Meal ML Edit...
05 Meeting MG Edit...
06 Email Handling EH Edit...
07 Fax Handling FH Edit...
08 Web Handling WH Edit...
09 General GL Edit...
Add new Unavailable Code...

3) From the list of codes click 'Edit' Or click 'Add a new Unavailable Code'

4) In the dialog enter Code Number, Name and a Short name (2 digits)

5) Click 'OK'

Creating Unavailable Code groups

It is important to keep track of who is available to answer calls at any given time. Equally it is important to be aware of the current status of any staff currently unavailable. Unavailable codes enable us to do this. When a member of a team becomes unavailable they must specify a reason via the unavailable code selection from their agent control toolbar. One problem that may be encountered is that of providing different sets of unavailable codes for different groups of staff.

Supervisors for example, may be able to attend meetings or review calls whereas telesales staff may not. To accommodate this requirement we can create groups of unavailable codes.

Typical group settings may be:

Supervisors Codes: Break, Refreshments, Meetings, Call Query

Sales Agents Codes: Break, Refreshments, Call Parts Dept

How To: Creating / Editing an Unavailable Codes group

1) Select Configure->Telephone System->Agent Control->Unavailable Code Groups from the menu

2) Select 'Create an Unavailable Code group'

3) Enter the name of the new Unavailable Code group in the dialog

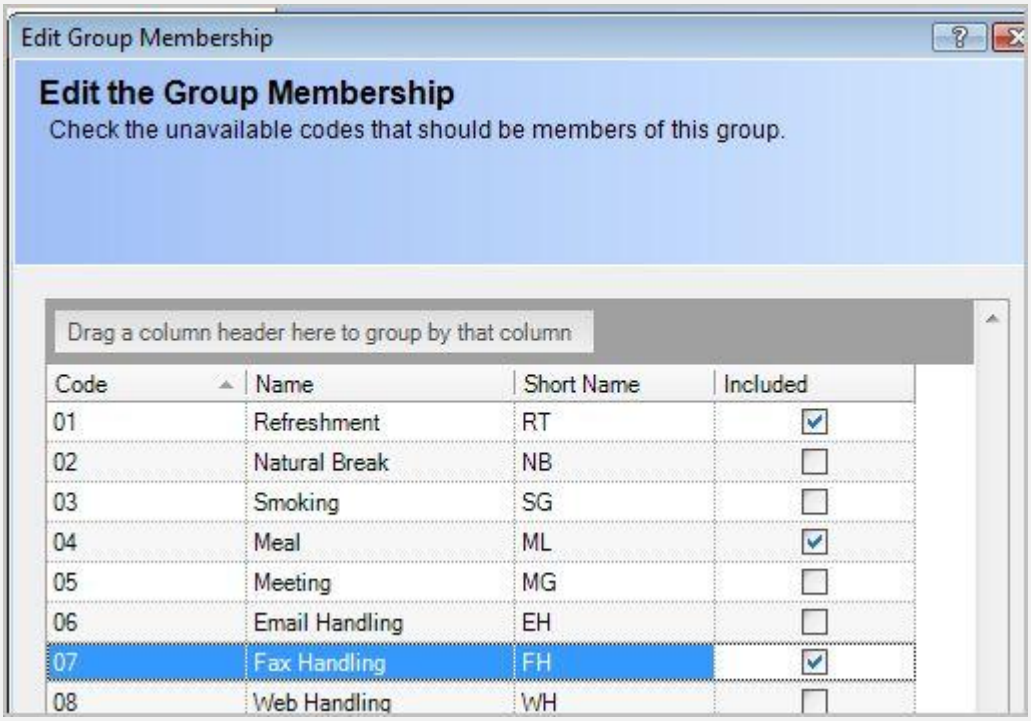
Create a New Unavailable Code Group
Identify the Unavailable Code Group
By giving the unavailable code group a recognisable name you can help others understand its meaning. Unavailable Code groups are used to restrict the unavailable codes that users can emply during their course of work.
PBX Code
Head Office
Name
Sales Supervisors

4) Click 'OK'

5) The new group will be added to the Unavailable Code menu

6) Select the newly created group and select 'Edit Unavailable Code Group configuration'

7) From the list of Unavailable Codes select the ones to include in your group by clicking the appropriate 'Included' checkbox. The codes selected will be the only codes a user allocated to this Unavailable Codes group can choose from.



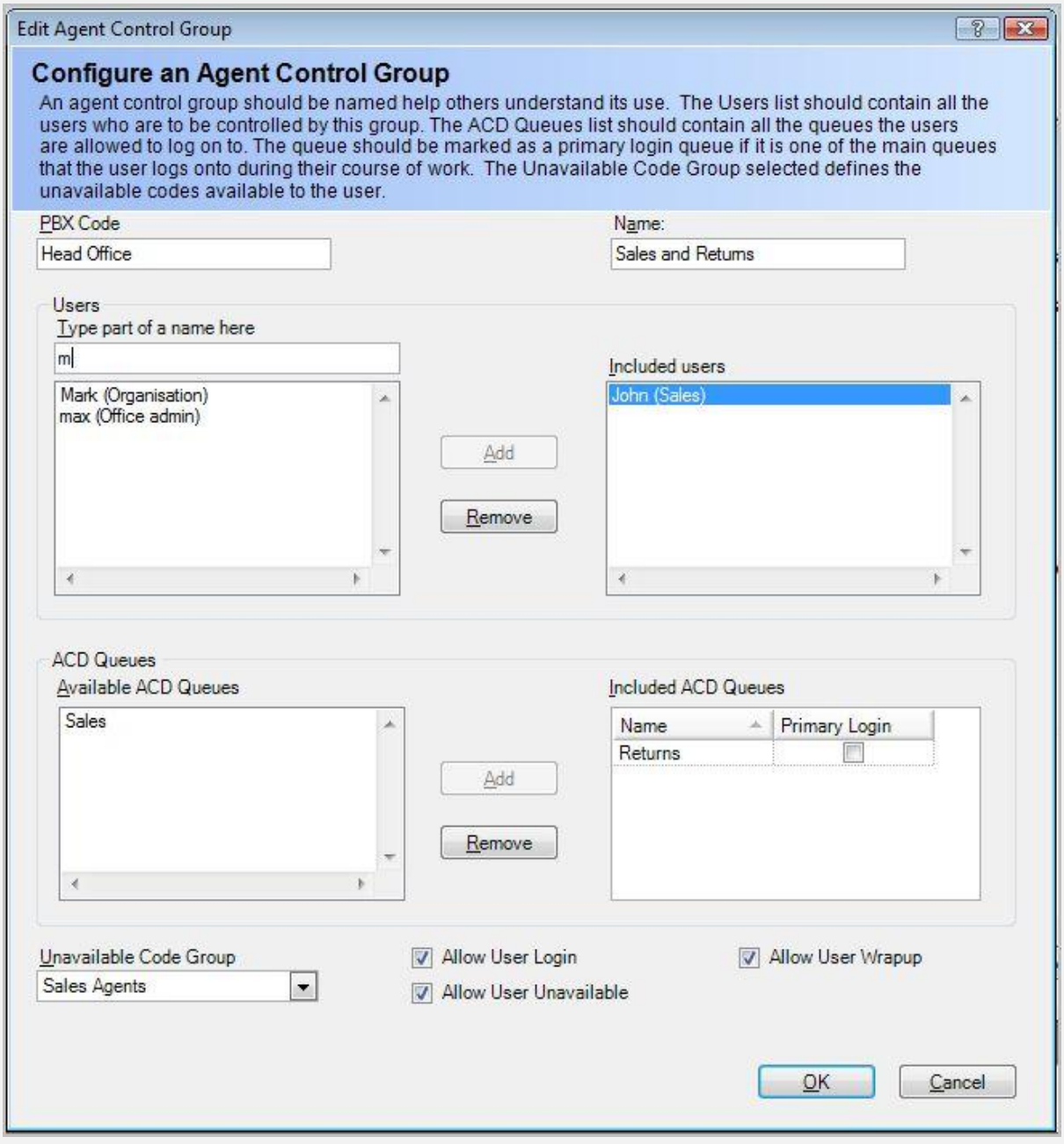
8) Click 'OK'

Creating Agent Control Groups

Associating users with ACD queues is accomplished via the 'Agent Control' group configuration. We create an 'Agent Control' group to identify a group of users and associate them with a set of ACD queues and 'Unavailable Code' groups. A given user can only be a member of one 'Agent Control' group but that group can be associated with several ACD queues. An ACD Queue can be included in as many 'Agent control' groups as required.

How To: Creating an Agent Control group

1) From the Agent Control menu select 'Create or Edit an Agent Control Group'
2) Either click 'Edit' for a group you want to modify or click 'Add a new Agent Control group'
3) Specify a name for the group
4) Select users to include in the group, type part of the users name for the user(s) to appear in the available box and click 'Add' to move the user to the included users box NB: Any user can only belong to one Agent Control group, you will get a warning message if the user already belongs to another group asking if you wish to move the user to this new group. If you click 'Yes' the user will be removed from the other group


Edit Agent Control Group
Configure an Agent Control Group
An agent control group should be named help others understand its use. The Users list should contain all the users who are to be controlled by this group. The ACD Queues list should contain all the queues the users are allowed to log on to. The queue should be marked as a primary login queue if it is one of the main queues that the user logs onto during their course of work. The Unavailable Code Group selected defines the unavailable codes available to the user.
PBX Code
Head Office
Name:
Sales and Returns
Users
Type part of a name here
m
Mark (Organisation)
max (Office admin)
Add
Remove
Included users
John (Sales)
ACD Queues
Available ACD Queues
Sales
Add
Remove
Included ACD Queues
Name
Primary Login
Returns
Unavailable Code Group
Sales Agents
Allow User Login
Allow User Unavailable
Allow User Wrapup
OK
Cancel

5) Select the required ACD queues from the Available list and add them to the Included ACD Queues list.
6) Select the 'Unavailable Code Group' appropriate for this group of users
7) Select whether to 'Allow user login', 'Allow User Unavailable', 'Allow User Wrapup'. These options limit these options for users within this Agent Control group.
8) Click 'OK' to save your settings.

That should complete the Agent Control configuration and you should now be able to log into the ACD system.

Completion Codes

Completion codes are used to identify important information about calls. By using the MyCalls completion codes agents can quickly add information to the call data using pre-defined codes. Columns can be defined in the calls grid to display the completion codes. In addition to the basic completion codes, two additional levels of related codes can be defined.

An example might be a sales organisation dealing in various categories of goods such as Computers, Cameras, DIY equipment and Garden tools. These might form the primary completion codes. We might also define a secondary code to indicate a successful sale e.g. Sale Completed or No Sale, finally we could gather some basic marketing information by asking the customer where they heard about the company and add a third level code e.g. Newspaper advert, Website etc.

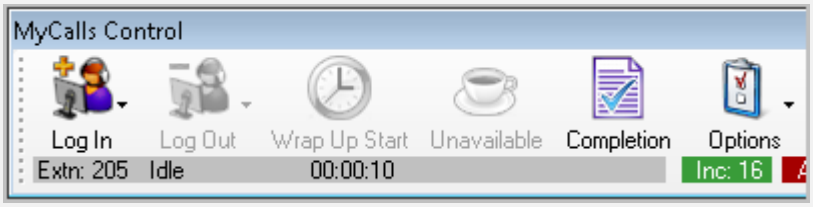
The first two levels of completion code i.e. Category of goods and success of sale would be mandatory whereas the third level would be optional as not all customers would necessarily answer the question.

Entering the completion codes

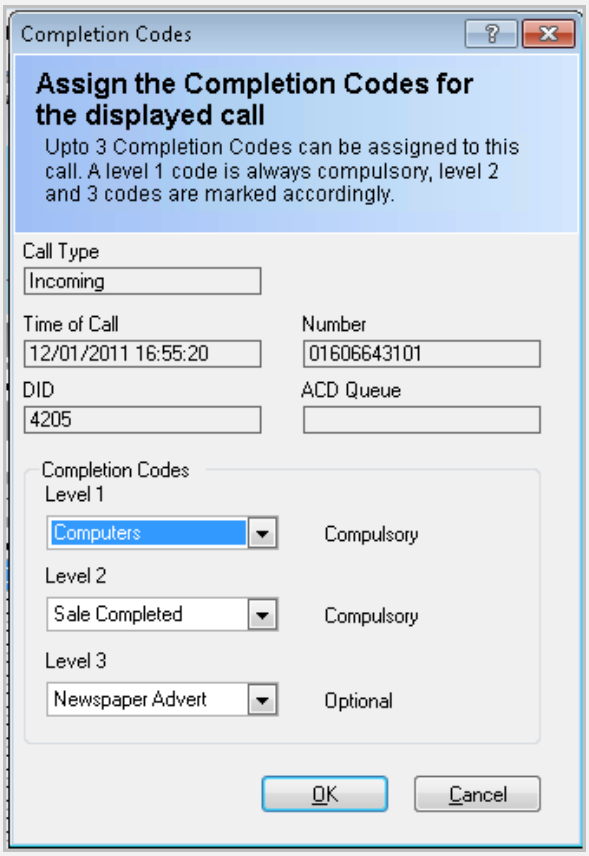
To make entry simple and foolproof the completion code entry dialog consists of a set of selectable items.

How To: Set the completion codes for a call

When a call is completed the Call Completion Code icon will become enabled in the Agent Control toolbar.



Click the Icon to display the completion code entry dialog



Select the appropriate entry for each level from the drop down lists

Click OK

Once entered the completion codes will become visible in the call logs although this may take time to appear depending on the screen refresh period.

Date/Time	From Device	To Device	Completion Code 1	Completion Code 2	Completion Code 3
12/01/2011 17:37	001 (001)	205 (205)	Computers	Sale Completed	Newspaper Advert

Completion codes configuration

This requires 3 steps

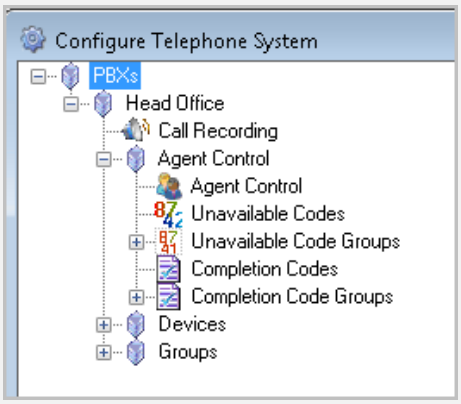
- Define the completion codes
- Create completion code groups and add the codes to them
- Define which completion code groups apply to which agents

How To: Defining Completion Codes

Select Configure Telephone system->PBXs->Agent Control

Click on ‘Completion codes’

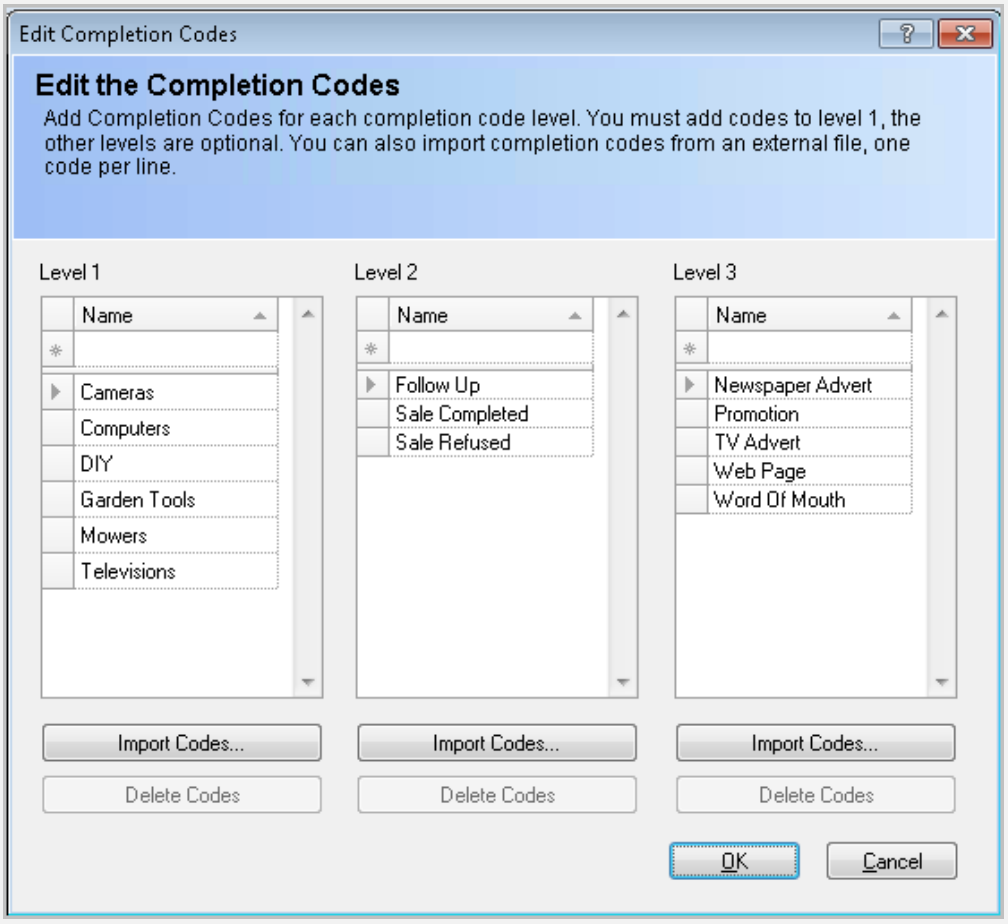
Click ‘Edit Completion Codes’



From the dialog displayed click inside the Name column and enter the completion code name.

Repeat this process until the list is complete and add codes for the other levels if required.

Codes can also be imported from a comma delimited file.

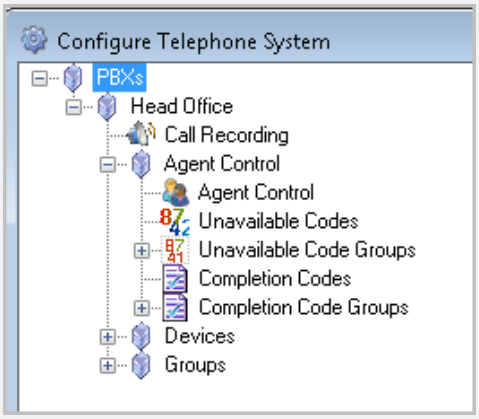


Click OK.

The completion codes created in the previous step are a complete list of all possible codes but not all agents want to select a code from a long list of codes. The agents need a short list of codes applicable to their department of job function. To accomplish this we need to create sets of completion codes which can then be assigned to agents. To do this we create completion code groups

How To: Creating a completion code group

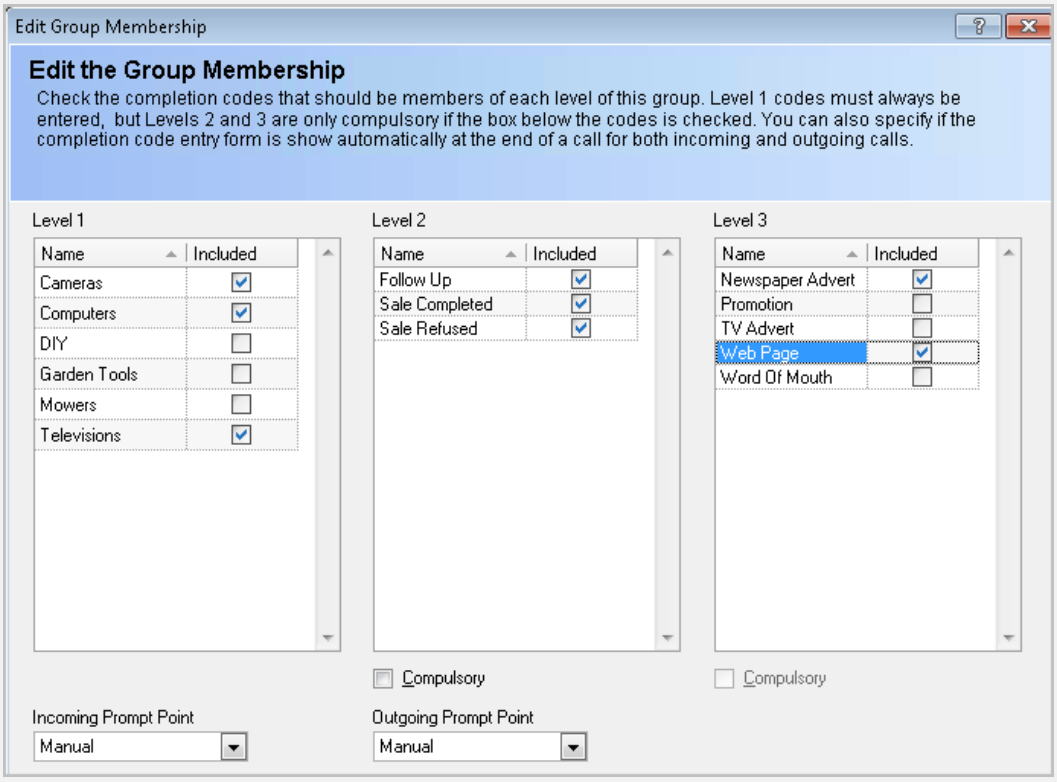
From the Agent control configuration menu select Completion code group



Click Create a new completion code group, Select the PBX (if required) and enter a name for the group and click OK.

Select the newly created group from the left hand menu

For each level select the required completion codes appropriate to the group



For levels 2 and 3 specify if these are compulsory items by clicking the checkbox

Specify the prompt behaviour for incoming and outgoing calls by selecting the incoming and outgoing prompt points. These can be Manual, Automatic or Disabled.

Click OK

Add the completion codes to an agent control group

The final stage is to Add the newly created completion code group to an agent control group. To do this open up an agent control group dialog and select the appropriate Completion Code Group from the dropdown list in the bottom left hand corner.

This will ensure that the agents within the selected group are able to select the appropriate completion codes when presented with the completion code dialog following a call.

Chapter 17

Reporting

MyCalls provides a comprehensive reporting facility. The reports can be run manually or scheduled and automatically distributed. Whilst having on screen statistics is useful for daily activities for more detailed planning and monitoring you need to use the reporting engine.

When to run reports

MyCalls offers a large selection of pre-defined reports that can be configured to look at every aspect of your call usage. There are two main types of report, Lists and Summaries. A list report will display individual call details, showing the time, date, CLI and other information relating to the call. A summary report will display the number of calls totalled up as well as other statistics. The reports can be easily renamed, copied and customised.

Selecting which reports to run

Reports can be either run in an ad-hoc manner where they are configured and run as they are required or as a saved report item. Saved reports can be run on demand or grouped together and run as a report schedule at a specified time

Creating and Using Report items from a template

Report templates are the definitions that form the basis of all reports. The report templates are organised into categories of:

- Availability: Used in conjunction with ACD to track the availability of users
- Performance: Used to show general performance indicators such as grade of service and responsiveness.
- System: Details alarms, audit logs, auto configured devices and unused or infrequently used devices
- Usage: Wide ranging reports showing phone system usage grouped and filtered by any combination of parameters. Reports can contain itemised details or summarised data.

The actual report templates are as follows

Availability

- Unavailable codes

- User availability

Performance

- Grade of service
- Response times

System

- Alarms Raised
- Auto Configured devices
- System Audit
- Unused devices

Usage

- Call Summary
- Call Details
- Call Type Summary
- Group Summary
- For each member
- Time Profile
- Top Calls
- Trunk Utilisation
- Directors Report

The Usage reports also provide a set of custom reports which allow you to configure the result columns of the report to suit your requirements. Custom reports are available for:

- Call Details
- Group Summary
- Group Summary for each member
- Group Summary profile

Running a report Template

Quick tip:

Whilst you can configure and run a report template directly it is not the recommended approach. The correct way to configure a report is to take a report- template and save it as a report item first. This allows you to configure a variant of the template with specific configuration parameters. The report can then be rendered at any time.

How To: Run a Report Template immediately

1) You can do this by clicking the 'Configure and Run Now' link in the right pane of the reporting area. You will have first had to select the relevant report you wish to run in the left pane of the configure reports window to make it the active report.
2) You will then need to configure the reports options before the report will be run and displayed in the report viewer.

Using Report Items

Report Items are report templates that have been configured and saved. They are created from the 'Create Saved Report Item' option from the report template. Each report item must be uniquely named and once created they can be:

- Run in the same way as a template report
- Edited
- Deleted.
- Placed into report schedules and run at a predefined time

By default, MyCalls, when installed, will have a number of pre-configured report items available to be run. The report items available will depend on the version of MyCalls being run, being either the Basic or Call Manager version.

Pre defined Report items

Custom Reports

Daily Agent Activity: Provides a summary set of values for all agents of a group for any given type of device. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

Custom Group Member Summary

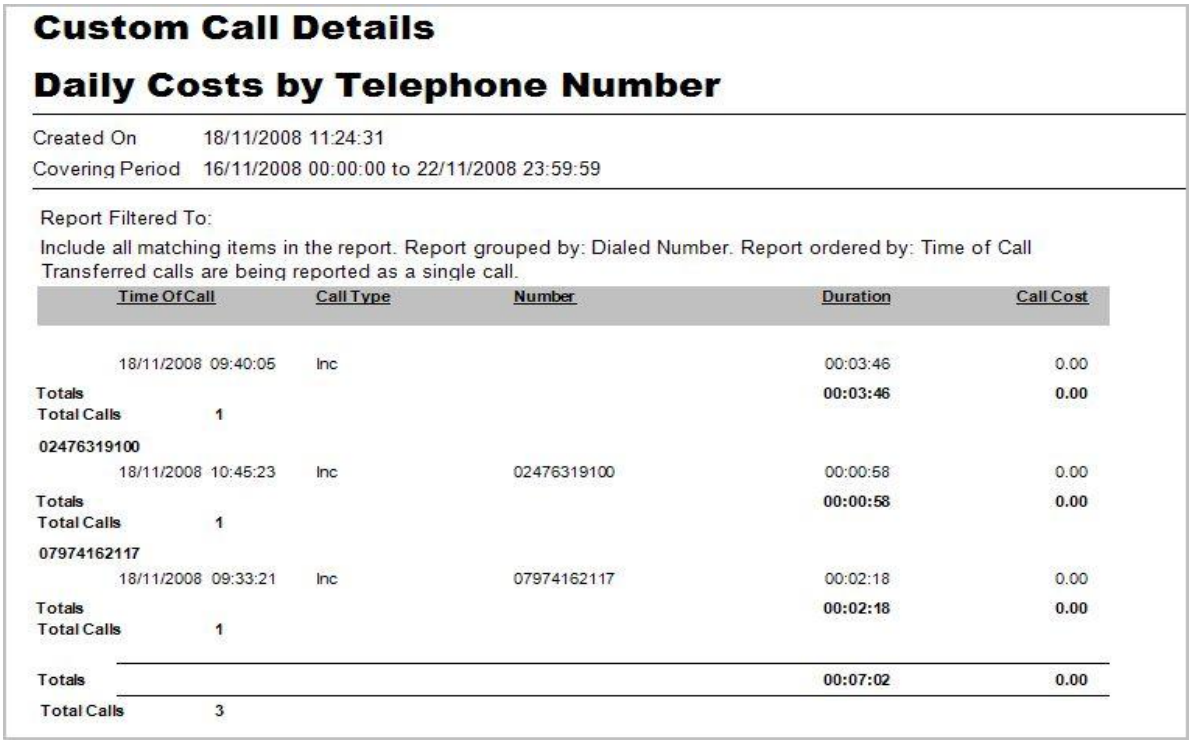
Daily Agent Activity

Created On 18/11/2008 11:14:08
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:
Show summaries for the device type: Organisation Group
Transferred calls are being reported as a multiple calls.

Group	First Log In At	Last Log Out At	% Time Free	% Time Busy	% Time Unavailable	% Time Wrapup

Daily Costs by Telephone Number: Provides a list of detailed calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Call Details

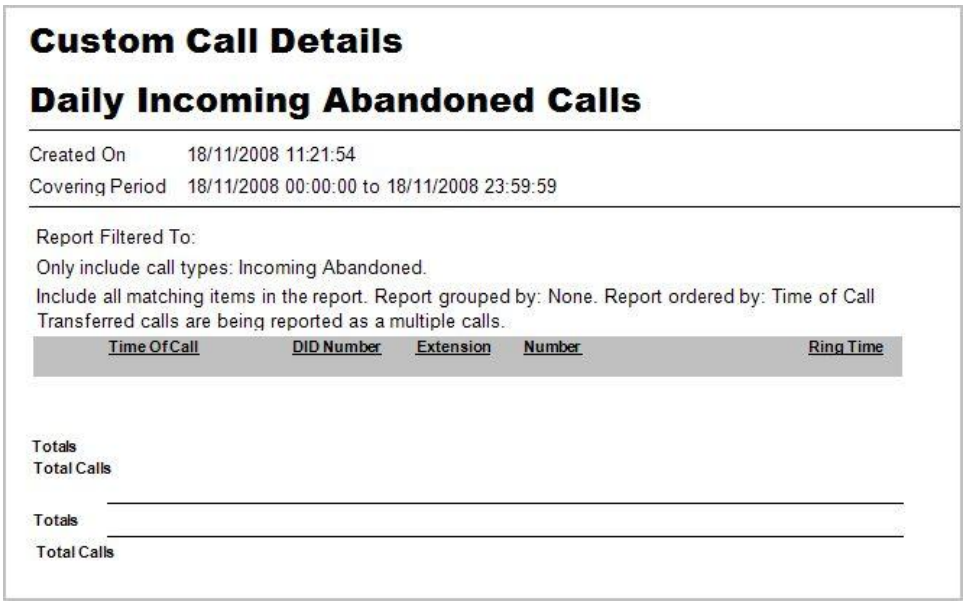
Daily Costs by Telephone Number

Created On 18/11/2008 11:24:31
Covering Period 16/11/2008 00:00:00 to 22/11/2008 23:59:59

Report Filtered To:
Include all matching items in the report. Report grouped by: Dialed Number. Report ordered by: Time of Call
Transferred calls are being reported as a single call.

Time Of Call	Call Type	Number	Duration	Call Cost
18/11/2008 09:40:05	Inc		00:03:46	0.00
Totals			**00:03:46**	**0.00**
Total Calls 1				
02476319100				
18/11/2008 10:45:23	Inc	02476319100	00:00:58	0.00
Totals			**00:00:58**	**0.00**
Total Calls 1				
07974162117				
18/11/2008 09:33:21	Inc	07974162117	00:02:18	0.00
Totals			**00:02:18**	**0.00**
Total Calls 1				
Totals			**00:07:02**	**0.00**
Total Calls 3				

Daily Incoming Abandoned Calls: Provides a list of detailed abandoned calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Call Details

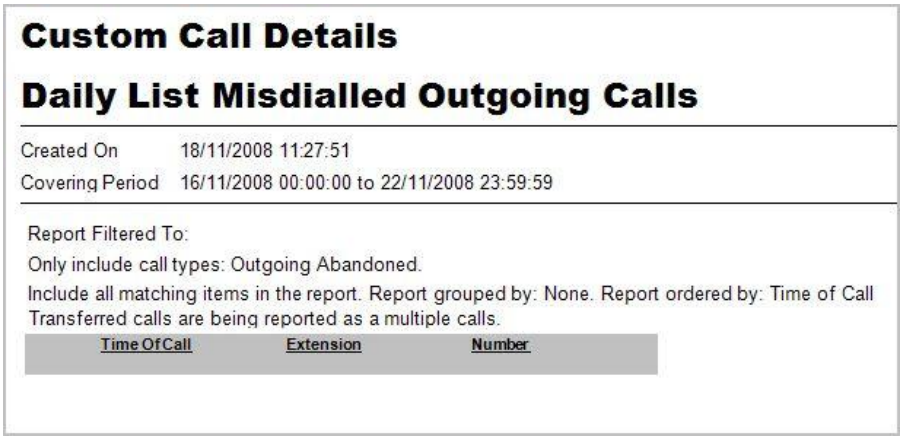
Daily Incoming Abandoned Calls

Created On 18/11/2008 11:21:54
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:
Only include call types: Incoming Abandoned.
Include all matching items in the report. Report grouped by: None. Report ordered by: Time of Call
Transferred calls are being reported as a multiple calls.

Time Of Call	DID Number	Extension	Number	Ring Time
Totals				
Total Calls				
Totals				
Total Calls				

Daily List Misdialled Outgoing Calls: Provides a list of misdialled outgoing calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Call Details

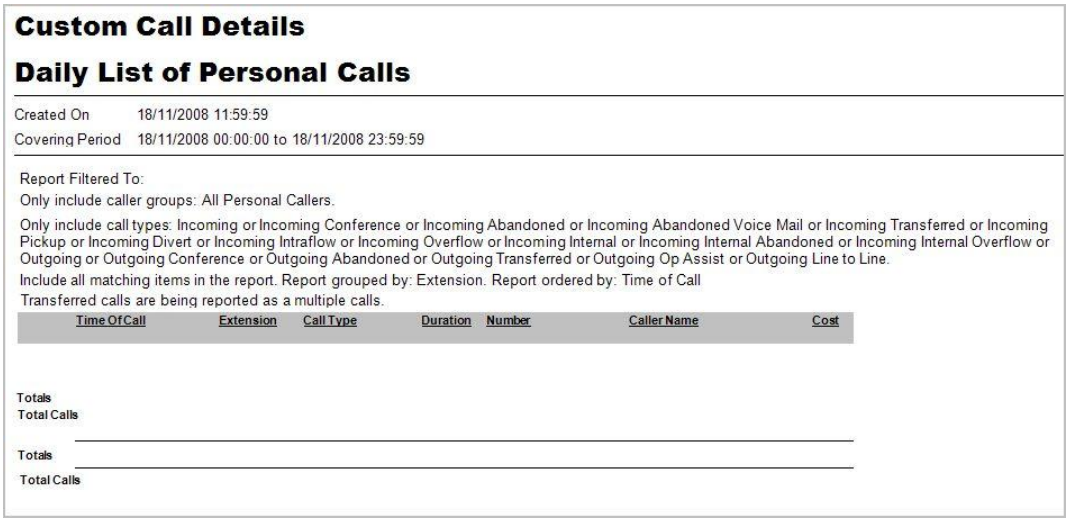
Daily List Misdialled Outgoing Calls

Created On 18/11/2008 11:27:51
Covering Period 16/11/2008 00:00:00 to 22/11/2008 23:59:59

Report Filtered To:
Only include call types: Outgoing Abandoned.
Include all matching items in the report. Report grouped by: None. Report ordered by: Time of Call
Transferred calls are being reported as a multiple calls.

Time Of Call	Extension	Number

Daily List of Personal Calls: Provides a list of personal calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Call Details

Daily List of Personal Calls

Created On 18/11/2008 11:59:59
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

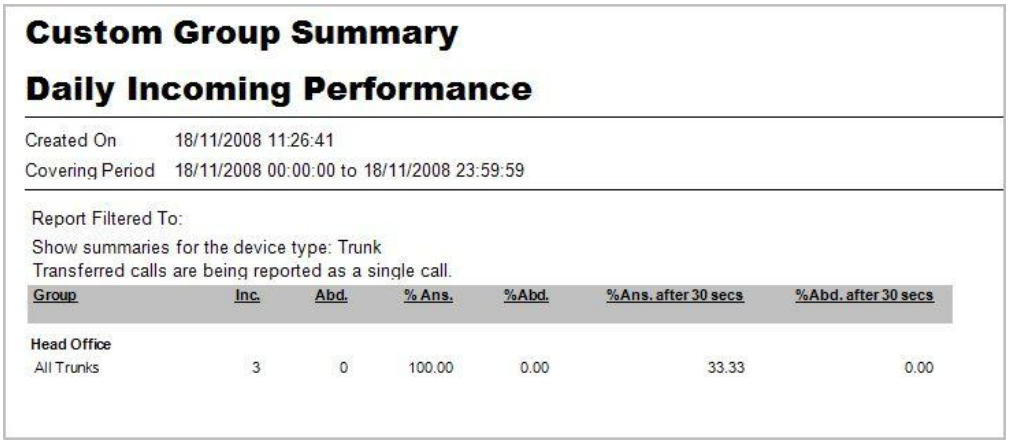
Report Filtered To:
Only include caller groups: All Personal Callers.
Only include call types: Incoming or Incoming Conference or Incoming Abandoned or Incoming Abandoned Voice Mail or Incoming Transferred or Incoming Pickup or Incoming Divert or Incoming Intraflow or Incoming Overflow or Incoming Internal or Incoming Internal Abandoned or Incoming Internal Overflow or Outgoing or Outgoing Conference or Outgoing Abandoned or Outgoing Transferred or Outgoing Op Assist or Outgoing Line to Line.
Include all matching items in the report. Report grouped by: Extension. Report ordered by: Time of Call
Transferred calls are being reported as a multiple calls.

Time Of Call	Extension	Call Type	Duration	Number	Caller Name	Cost

Totals
Total Calls

Totals
Total Calls

Daily Incoming Performance: Provides a summary of incoming call performance. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Group Summary

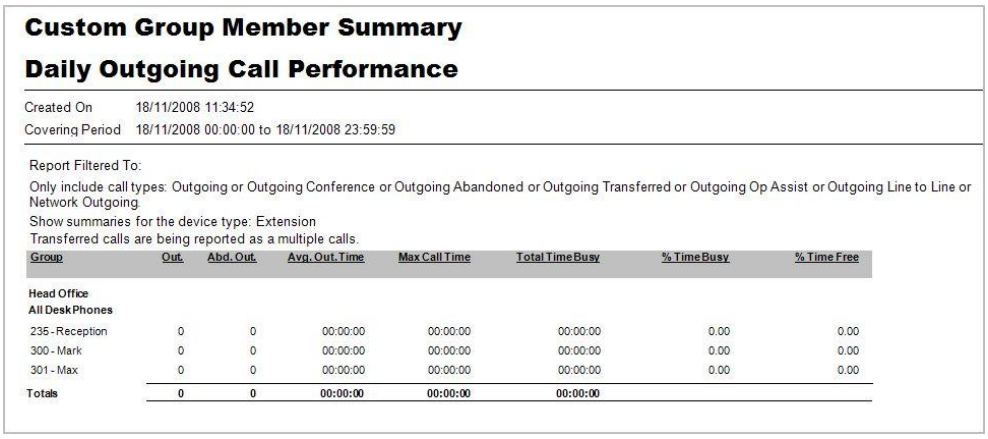
Daily Incoming Performance

Created On 18/11/2008 11:26:41
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:
Show summaries for the device type: Trunk
Transferred calls are being reported as a single call.

Group	Inc.	Abd.	% Ans.	%Abd.	%Ans. after 30 secs	%Abd. after 30 secs
Head Office						
All Trunks	3	0	100.00	0.00	33.33	0.00

Daily Outgoing Call Performance: Provides a summary of outgoing call performance. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Group Member Summary

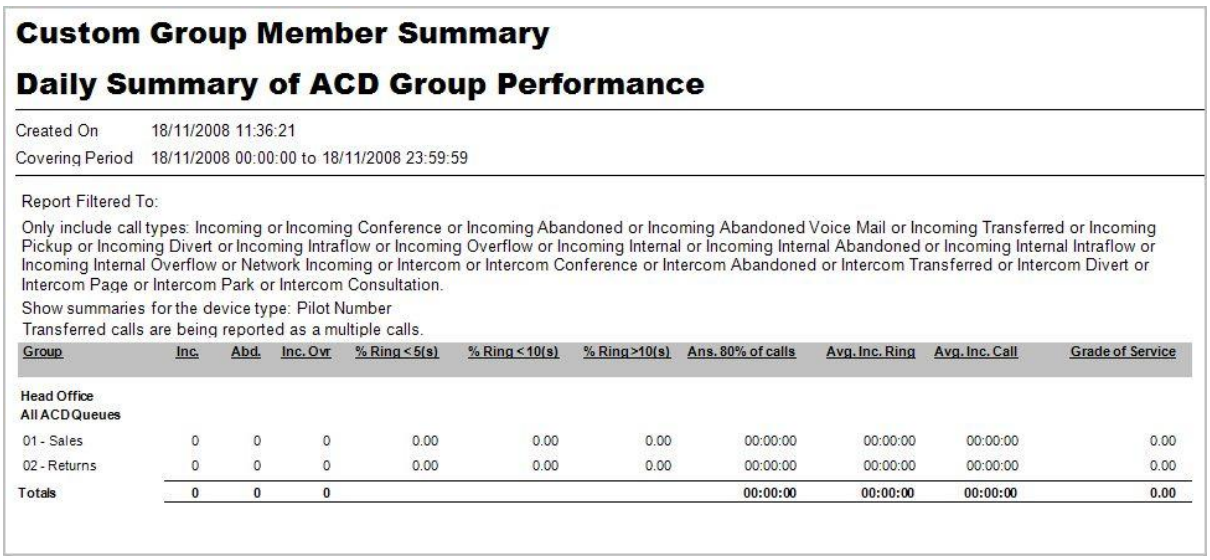
Daily Outgoing Call Performance

Created On 18/11/2008 11:34:52
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:
Only include call types: Outgoing or Outgoing Conference or Outgoing Abandoned or Outgoing Transferred or Outgoing Op Assist or Outgoing Line to Line or Network Outgoing.
Show summaries for the device type: Extension
Transferred calls are being reported as a multiple calls.

Group	Out.	Abd. Out.	Avg. Out. Time	Max Call Time	Total Time Busy	% Time Busy	% Time Free
Head Office							
All Desk Phones							
235 - Reception	0	0	00:00:00	00:00:00	00:00:00	0.00	0.00
300 - Mark	0	0	00:00:00	00:00:00	00:00:00	0.00	0.00
301 - Max	0	0	00:00:00	00:00:00	00:00:00	0.00	0.00
Totals	**0**	**0**	**00:00:00**	**00:00:00**	**00:00:00**		

Daily Summary of ACD Group performance: Provides a summary of ACD performance. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.



Custom Group Member Summary

Daily Summary of ACD Group Performance

Created On 18/11/2008 11:36:21
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:
Only include call types: Incoming or Incoming Conference or Incoming Abandoned or Incoming Abandoned Voice Mail or Incoming Transferred or Incoming Pickup or Incoming Divert or Incoming Intraflow or Incoming Overflow or Incoming Internal or Incoming Internal Abandoned or Incoming Internal Intraflow or Incoming Internal Overflow or Network Incoming or Intercom or Intercom Conference or Intercom Abandoned or Intercom Transferred or Intercom Divert or Intercom Page or Intercom Park or Intercom Consultation.
Show summaries for the device type: Pilot Number
Transferred calls are being reported as a multiple calls.

Group	Inc.	Abd.	Inc. Ovr	% Ring < 5(s)	% Ring < 10(s)	% Ring >10(s)	Ans. 80% of calls	Avg. Inc. Ring	Avg. Inc. Call	Grade of Service
Head Office All ACD Queues										
01 - Sales	0	0	0	0.00	0.00	0.00	00:00:00	00:00:00	00:00:00	0.00
02 - Returns	0	0	0	0.00	0.00	0.00	00:00:00	00:00:00	00:00:00	0.00
Totals	**0**	**0**	**0**				**00:00:00**	**00:00:00**	**00:00:00**	**0.00**

List: All Abandoned Calls: Provides a list of abandoned calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extension group or organization group.

Call Details

List: All Abandoned Calls

Created On 18/11/2008 11:37:17
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:
Only include call types: Incoming Abandoned or Incoming Abandoned Voice Mail.
Include all matching items in the report. Report grouped by: None. Report ordered by: Time of Call
Transferred calls are being reported as a single call.

Time Of Call	User	Call Type	Total Duration	Tfr	Caller Name	Dialled Number	Location	Ring Time	Call Cost	Handling Cost	Total Cost
Totals	**Calls**										
Totals	**Calls**										

Monthly Reports

- **List: Most Dialled Numbers:** Provides a list of numbers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for the number or the call handling cost for that number.
- **List: Most Frequent Incoming Callers:** Provides a list of callers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for the number or the call handling cost for that number.
- **Summary: All Calls:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Costing Type:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Extension:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device grouped by extension usage.
- **Summary: All Calls by Trunk:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device grouped by trunk usage.

Weekly Reports

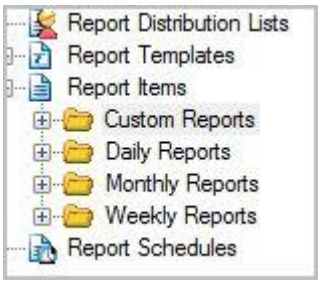
- **List: Most Dialled Numbers:** Provides a list of numbers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for that number or the call handling cost for that number.
- **List: Most Frequent Incoming callers:** Provides a list of callers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for that number or the call handling cost for that number.
- **Summary: All Calls:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Costing Type:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Extension**: Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device.
- **Summary: All Calls by Trunk:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device.

Daily Reports

- **List: All Calls**: Provides a list of detailed calls that are grouped by a specified device type, such as extension or account codes. The report can be further filtered so it only applies to a certain range of devices such as a specific extension group or organization group.
- **List: All Calls by Telephone Number**
- **List: All Calls to Voice Mail**

- **List: All Outgoing Calls**
- **List: Calls to International Numbers**
- **List: Calls to Mobile Numbers**
- **List: Calls to Special Numbers (Premium)**
- **List: Calls Under 1 Minute Long**
- **List: Call Costs by Most Expensive Call:** Provides a list of calls that are ordered by either their duration, call cost, handling cost, ring or held times and above a certain level, such as calls over ten minutes long. The report can be further filtered so it only applies to a certain range of devices such as a specific extension group or organization group.
- **List: Grade of Service:** Provides a list of the 30 minute interval periods that did not meet the specified grade of Service.
- **List: Most Dialled Numbers:** Provides a list of numbers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for that number or the call handling cost for that number.
- **List: Most Frequent Incoming Callers**
- **Summary Profile: All calls by Half Hour:** Provides a summary of the volumes and handling times for any collection of device groups, split into time intervals.
- **Summary profile: ANS/ Abd Calls by Ring Time:** Lists the number of calls that have a time parameter within a specified time period. By using a Ring Time Parameter on abandoned calls this report can show at what point most callers abandon their calls.
- **Summary: All Calls by Account Code:** Provides a summary of the volumes and handling times of different call types for all members of a group for any given type of device.
- **Summary: All Calls by ACD Group**
- **Summary: All Calls by Agent**
- **Summary: All Calls by DID**
- **Summary: All Calls by Extension**
- **Summary: All Calls by trunk**
- **Summary: All Calls by Costing Type:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Incoming Calls**
- **Summary: All Outgoing Calls**
- **Summary: Overflowed Calls by ACD Group**
- **Summary: Grade of Service:** Provides a summary of the percentage of 30 minute intervals for which the Grade of Service exceeded a specified value.
- **Usage: Trunk usage by Half Hour:** Lists the number of trunks that were concurrently busy for each interval. The total duration of all the calls for that time interval and a percentage of the trunks busy against the number of trunks available is also shown. This report allows you to identify times where your lines are being used most and whether you have too many or too few lines available.

Using Report items



How To: Creating a Report item

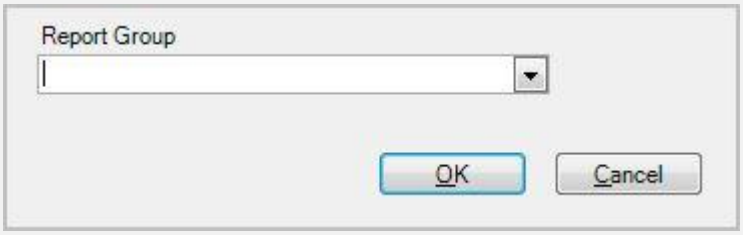
1) Select 'Report Template' on the left side of the configure reports window
2) Select 'Create Saved Report Item' in the right pane. You will be asked to provide your report with a name and choose a destination directory to save the report in. You can choose a pre defined report group from the drop down list or you can enter a new report group manually.
3) Next you will need to configure the report options before the report item will be saved and available to run from the report group you saved it in.

How To: Editing a Report item

1) Each report item can be edited as required and the resulting changes saved
2) Open the report item by clicking 'Edit Report item'
3) Go through the report wizard and make the required changes to the report
4) Click 'Finish'
5) Your changed have now been saved
6) If the changes to the report are extensive it is recommended that you copy the report item first and then rename the copy and edit that.

How To: Creating a Report item group

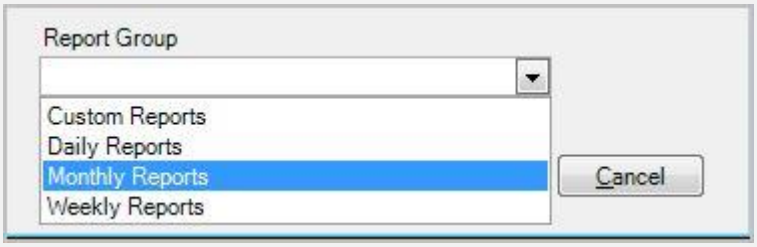
1) Click 'Reports'
2) Click 'Report Items' on the left side of the configure reports window
3) Select the item you wish to create a group for e.g. Daily Agent Activity
4) Click 'Change Group' in the right side of the configure reports area



5) Enter the name of the new group you wish to create
6) Click 'OK'

How To: Moving a Report item to a different group

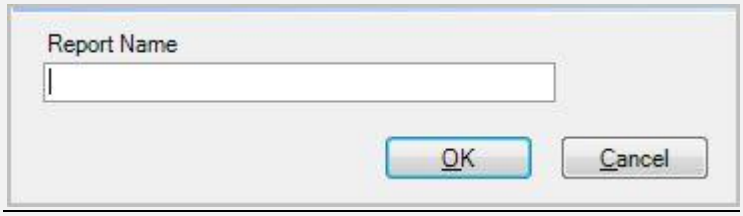
1) Click 'Reports'
2) Click 'Report Items'
3) Select the item that you wish to move
4) Click 'Change Group' in the reports configuration area



5) Select the group you wish to move the item to from the drop down menu
6) Click 'OK'
7) The item will now be in the new group

How To: Copying an existing Report Item as the basis for your new Report

1) Click 'Reports'
2) Click 'Report Items'
3) Click 'Copy Report Item'



4) Enter the report name e.g. Daily Incoming Performance
5) Click 'OK'
6) The report will have been copied.

How To: Customising a copied Report item

1) Click 'Reports'
2) Expand 'Report items'
3) Select the item that you wish to customise, e.g. Daily Reports - 'List: All Calls to Voicemail'
4) It is recommended that you copy the report item first. Click 'Copy Report Item'
5) This item, once copied, will appear in the list. Select this newly copied report to edit.
6) Click 'Edit Report Item'
7) A new window will open where you can change the settings. Click 'Next' to navigate through and click 'Finish' when you have made the changes.

How To: Deleting a Report item

1) Click 'Reports'
2) Click 'Report Items'
3) Select the item you wish to delete
4) Click 'Delete Report Item'
5) Click 'Yes'

General operations for configuring report templates and report items

In order to create a report item you will need to configure the report so it renders the information you require. There are a number of steps involved and the exact sequence is dependent on the specific report and also on the selections you make during the configuration process. There are a number of operations common to many of the report templates and these operations such as setting the reporting period, filtering etc are described generally below. All configurations of reports are accomplished via the report wizard.

The Report wizard

Creating and editing report items will involve using the report wizard. The wizard takes you through various pre-defined steps and allows you to construct your report. Each step deals with a distinct aspect of producing the report and whilst the details of each step will vary, dependent on the specific report being produced, the general type of information being configured fall into the following categories:

Reporting period

Defines the period for which the report collates data. This can be for as small a period as a few hours to a complete report covering a year or more.

Grouping

Define the way in which the report groups the results. For example you may wish to break down your report by extension or extension group, you may wish to break down the report by grouping together calls of a specific type such as outgoing or incoming.

Consolidation of transferred calls

Each segment of a transferred call (either incoming or outgoing) can be logged as a separate statistic. When viewing a call as a whole it may be preferable to collect all the call segments and present the call statistics as a single call. This allows you to decide which way you want to see the call statistic for transferred calls

Filtering

When setting up a report you usually don't want to see all the possible information relating to a particular aspect of the call data. If you are viewing extension statistics for example you might want to see only a particular range or group of extensions or even an individual extension. To accomplish this you can specify a set of filters for the report. The exact filtering available depends on the type of report being generated.

The initial filter screen will allow you to specify groups of devices or data that you wish to filter on. When you have done that you will then be presented with a series of screens which allow you to specify detailed filtering information.

Quick tip:

Detailed reports covering long time periods can result in delays whilst the reports are generated.

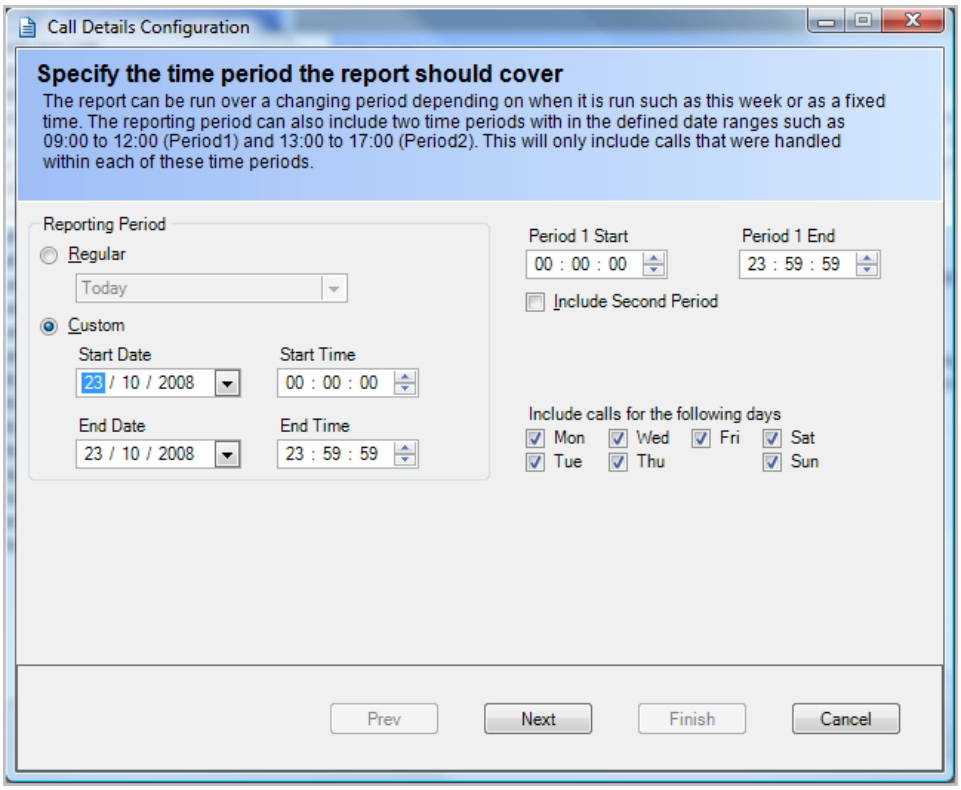
Scheduling these sorts of reports to run out of hours is recommended.

Setting the Reporting period

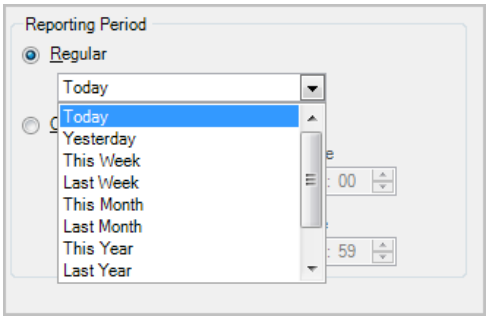
The reporting period is defined as the first stage of the report creation wizard. There are various parameters available dependent on the complexity of the required report. The different forms presented by the wizard can include the following settings.

Basic Time and Date Entry

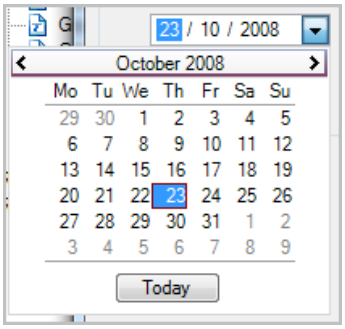
You will be presented with the options to select a 'Regular' period or a 'Custom' period.


Call Details Configuration
Specify the time period the report should cover
The report can be run over a changing period depending on when it is run such as this week or as a fixed time. The reporting period can also include two time periods with in the defined date ranges such as 09:00 to 12:00 (Period1) and 13:00 to 17:00 (Period2). This will only include calls that were handled within each of these time periods.
Reporting Period
Regular
Today
Custom
Start Date
23 / 10 / 2008
Start Time
00 : 00 : 00
End Date
23 / 10 / 2008
End Time
23 : 59 : 59
Period 1 Start
00 : 00 : 00
Period 1 End
23 : 59 : 59
Include Second Period
Include calls for the following days
Mon
Tue
Wed
Thu
Fri
Sat
Sun
Prev
Next
Finish
Cancel

Regular: Select the report period from the drop down menu e.g. this week, last week etc.



Custom: Specify the Start/End date and times. Clicking on the Date displays a calendar control to make selection of Dates easier.

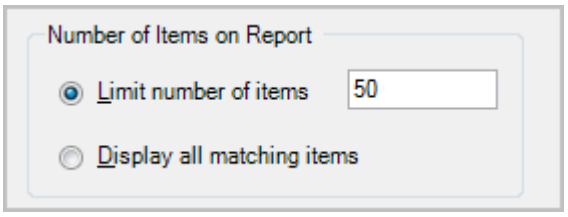


Include calls for the following days: A series of check boxes allowing you to select which days of the week are included in the report.

Define periods: Certain reports allow the setting of up to two periods e.g. 9:00 – 12:00 , 14:00 – 18:00. This allows you to include or exclude certain periods during the day e.g. Shift periods, Lunch breaks etc.

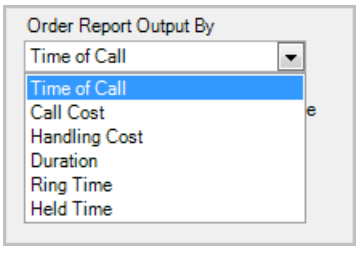
Limiting the report length

You may specify the maximum number of records a report can contain or specify that you wish to see all records matching the criteria defined in the report configuration. To limit the number of items simply type the number of records into the textbox.



Ordering Results

You can specify how you wish the results ordered in the report. Specifying 'Time of call' for instance will display your results in order from the earliest time through to the latest time; alternatively specifying 'Duration' would display calls from the shortest to the longest call.



Grouping results

Grouping results allows you to specify which results need to be kept together in the report. The grouping options depend on the type of report being produced.

Example: Grouping by extension

You wish to report on extensions showing the number of calls made by each extension within a certain group. Group by extension which means that each extension will be shown with all the calls associated with that extension listed in a group below it.

Maximum report items limit: 50 Report grouped by: Extension. Report ordered by: Time of Call
Transferred calls are being reported as a multiple calls.

	Time Of Call	Call Type	Duration	Number
2462				
	28/08/2008 06:38:08	Inc	00:00:19	0041338286633
	28/08/2008 07:33:18	Inc	00:00:37	00861065222562
Totals			**00:00:56**	
Total Calls	**2**			
2471				
	28/08/2008 08:39:21	Inc	00:00:10	07943808598
Totals			**00:00:10**	
Total Calls	**1**			
2478				
	28/08/2008 01:57:53	Inc	00:00:14	07947328478
	28/08/2008 06:04:56	Inc	00:02:28	07843602887
Totals			**00:02:42**	
Total Calls	**2**			
2541				
	28/08/2008 08:32:33	Out Abd	00:00:00	01737761201
	28/08/2008 08:32:52	Out Abd	00:00:00	01737761201
	28/08/2008 08:33:00	Out Abd	00:00:00	01737761201
	28/08/2008 08:33:07	Out Abd	00:00:00	01737761201

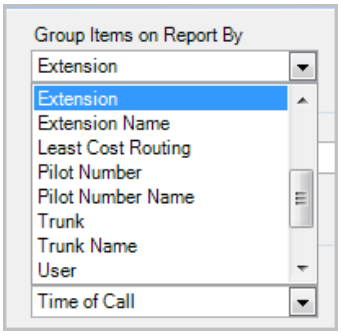
Extension 2462 is shown with two calls, 2471 has 1 call, 2578 has 2 calls and 2541 has 4 calls. Calls are ordered by ascending ‘time of call’ (earliest first).

Types of Grouping screens found in the reporting wizard

Different report templates provide varying levels of grouping complexity or format dependent on the type of report. The simplest type of grouping comprises a drop down menu of device types. More complex reports allow you to select the device and select groups and types of device.

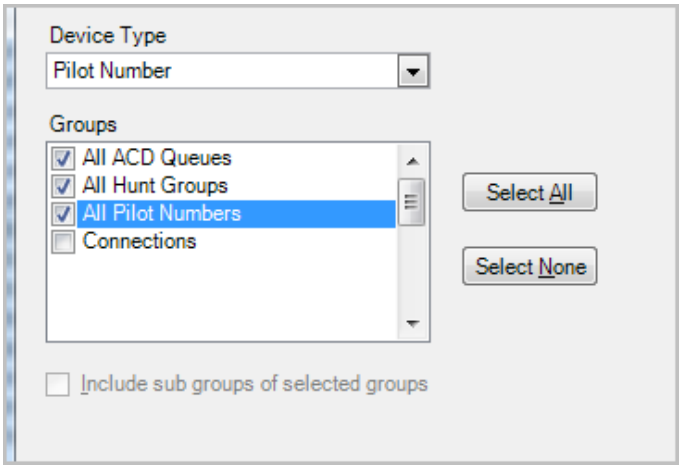
Grouping in ‘Call Detail’ reports

The simplest type of grouping allows you to select the grouping item from a drop down menu.



Grouping in 'Group Summary' reports

More advanced grouping gives you the option to select a group of devices, Extensions, DDIs etc and then pick from the list of groups defined for that device. If you select Pilot Numbers for example then a list of the Pilot groups will appear from which you may select one or more for grouping purposes.



Filtering results

Setting the filter groups

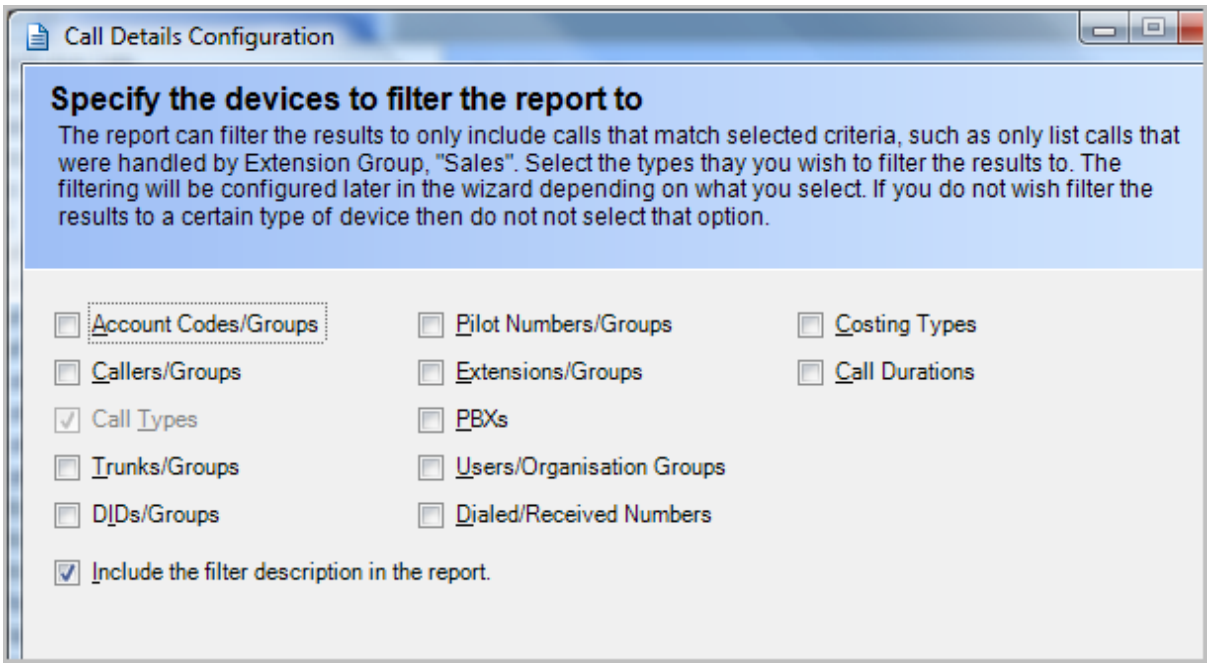
To ensure the reports you are configuring only produce the information you require you will need to apply filters to the results.

Filters allow only the specified information to be processed in the final report.

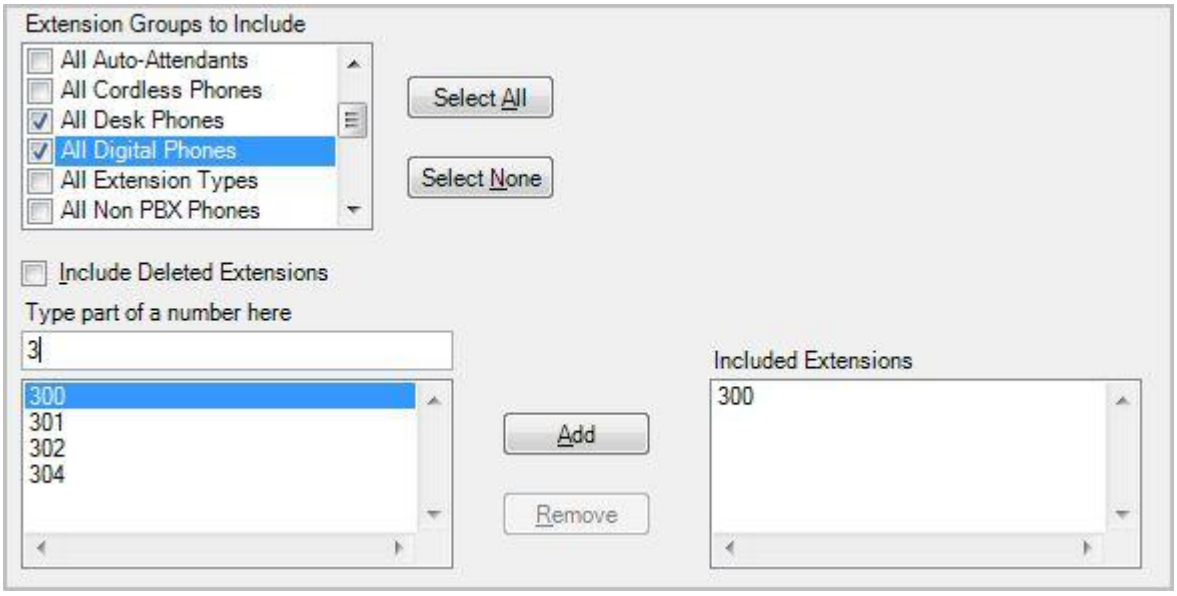
For example you may want to produce a report grouped by class of call i.e. incoming, outgoing etc but only detailing the calls to and from the sales department. To accomplish this you would specify a call detail report specifying the class of call i.e. Incoming, Outgoing etc, as the grouping field but applying an extension group filter and selecting the sales group in the filter details.

Setting filters is a two stage process

1. Specify which devices, users, call types etc you wish to apply filters to


Call Details Configuration
Specify the devices to filter the report to
The report can filter the results to only include calls that match selected criteria, such as only list calls that were handled by Extension Group, "Sales". Select the types thay you wish to filter the results to. The filtering will be configured later in the wizard depending on what you select. If you do not wish filter the results to a certain type of device then do not not select that option.
Account Codes/Groups
Callers/Groups
Call Types
Trunks/Groups
DIDs/Groups
Pilot Numbers/Groups
Extensions/Groups
PBXs
Users/Organisation Groups
Dialed/Received Numbers
Costing Types
Call Durations
Include the filter description in the report.

2. Select the detailed information for each of the types of filtering selected in stage 1. Each of the device filters defined in the first stage will cause a detail filter screen to be displayed. This detailed screen will appear as part of the sequence of screens for configuring the report and will present you with the detailed information appertaining to that device. For example the screenshot shown below illustrates the detailed selections for extension devices.



The detailed filter screens are similar in operation. You choose which groups of device to include in the report and /or individual devices to include in the report. So in the example above you could include a complete group or a single extension. Any items not included in the filter are excluded from the report.

Deleted devices

The option to include deleted devices enables correct reporting of historical data In the event that a report is required for some period in the past and devices had been deleted since then.

Including an individual device

With reference to the screenshot above, type a part of the extension you wish to include until you can locate the extension(s) required from the individual extension list. Select the extension(s) required and click the Add button. The extensions to be included in the report will appear in the right hand, 'Included Extensions' box. Click the remove button to remove the extensions if they are not required.

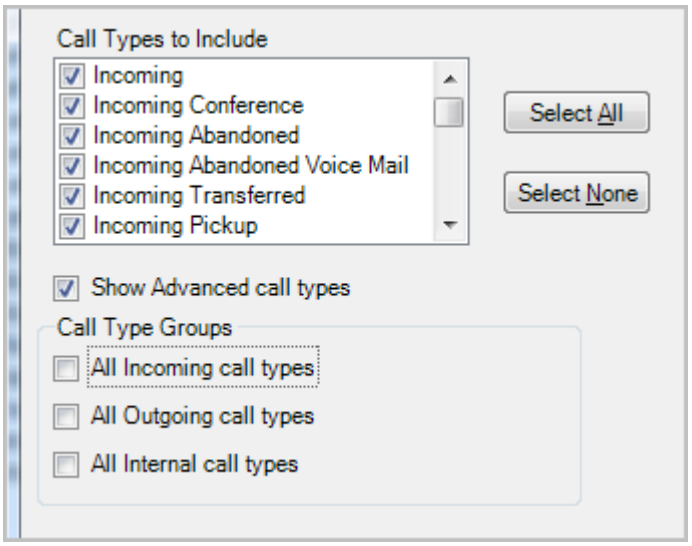
Specifying Call types to include in a report

Many of the report templates allow you to specify call types for inclusion in the reports. This means you can analyse only incoming call types or only outgoing call types or even down to specific types of call such as incoming abandoned, outgoing transferred etc.

For more detail on available call types see the detailed list in Appendix A.

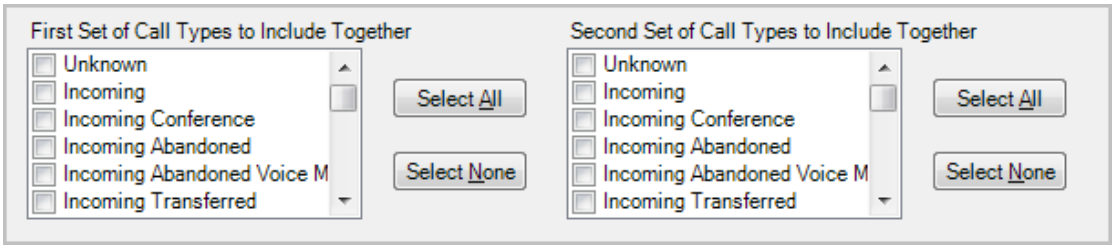
You can select the call types from the list of 'Call Types to Include' . This list includes a breakdown of all the possible call types available or you can simplify the list by deselecting the 'Show Advanced call types' checkbox

Alternatively you can select the three basic call types; Incoming, outgoing and internal by checking the appropriate 'Call Type Group' checkbox.



Configuring the call types for comparison

When configuring reports which compare call types for specified intervals (see next section) you are asked to provide call type information for two sets of call types. This is exactly the same procedure as for defining call types described above (see 'Specifying Call types to include in a report') with the additional requirement to select two sets of call type. Typically you might want to compare incoming versus incoming abandoned or incoming versus outgoing.



The available MyCalls usage reports include:

- Detail and summary reports
- Time distribution and profiling
- Frequent calls
- Top Calls
- Trunk Utilisation
- Custom reports

Standard Report

For the purposes of this manual a basic report configuration would contain one or more of the following configuration steps.

- Reporting period
- Grouping
- Ordering
- Transfer Consolidation
- Filtering
- Call type selection

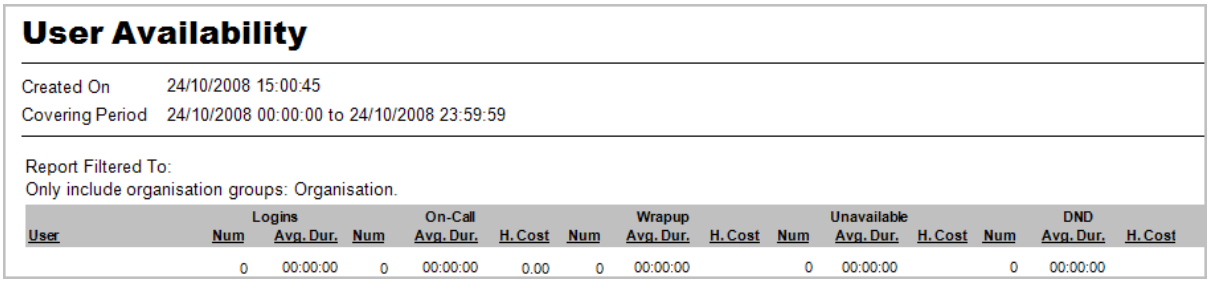
Most reports contain these steps plus in most cases additional report specific screens. These standard configuration steps are explained in the previous section. The following sections describe the specific report templates and any special report specific configuration screen.

Availability Reports

User Availability

Displays a summary of number of times and average time spent in various states:

Logins, On-Call, Wrap Up, Unavailable, DND



User Availability

Created On 24/10/2008 15:00:45
Covering Period 24/10/2008 00:00:00 to 24/10/2008 23:59:59

Report Filtered To:
Only include organisation groups: Organisation.

User	Logins			On-Call			Wrapup			Unavailable			DND		
	Num	Avg. Dur.	Num	Avg. Dur.	H. Cost	Num	Avg. Dur.	H. Cost	Num	Avg. Dur.	H. Cost	Num	Avg. Dur.	H. Cost
	0	00:00:00	0	00:00:00	0.00	0	00:00:00		0	00:00:00		0	00:00:00	

User Availability - Detail

This report provides a more detailed chronological report of the various states of availability on a per-user basis.

User Availability Detail

Created On 24/10/2008 15:05:21
Covering Period 01/08/2008 00:00:00 to 02/08/2008 23:59:59

Report Filtered To:
Only include organisation groups: Organisation.

Time	Type	Extension	Pilot Name	Code	Duration
2910 - Dave Simmons					
01/08/2008 10:05:41	Logged On	2910	General Sales		06:33:58
01/08/2008 10:39:50	In Wrapup	2910			00:00:16
01/08/2008 10:40:06	Out Wrapup	2910			
01/08/2008 11:45:35	In Wrapup	2910			00:00:15
01/08/2008 11:45:50	Out Wrapup	2910			
01/08/2008 12:08:58	In Wrapup	2910			00:00:16
01/08/2008 12:09:14	Out Wrapup	2910			
01/08/2008 16:39:39	Logged Off	2910	General Sales		31:20:21

This report shows a profile of various availability states at defined time intervals. Time intervals can be set to multiples of the following:

- Minute
- Hour
- Day
- Week

The example screenshot has a reporting period limited to the hours of 09:00 – 18:00 with a time interval of 1 hour. If the reporting period was set to the whole 24 hours then the out of hours results (16:00 – 09:00) would show zeroes which would be unnecessary for the report.

User Availability Profile

Created On 24/10/2008 15:16:57
Covering Period 01/08/2008 09:00:00 to 02/08/2008 17:59:59

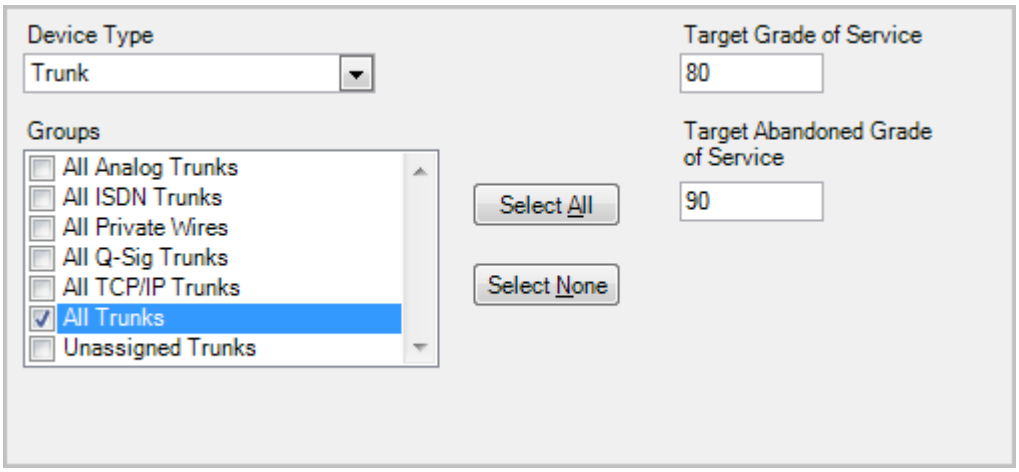
Report Filtered To:
Only include organisation groups: Organisation.

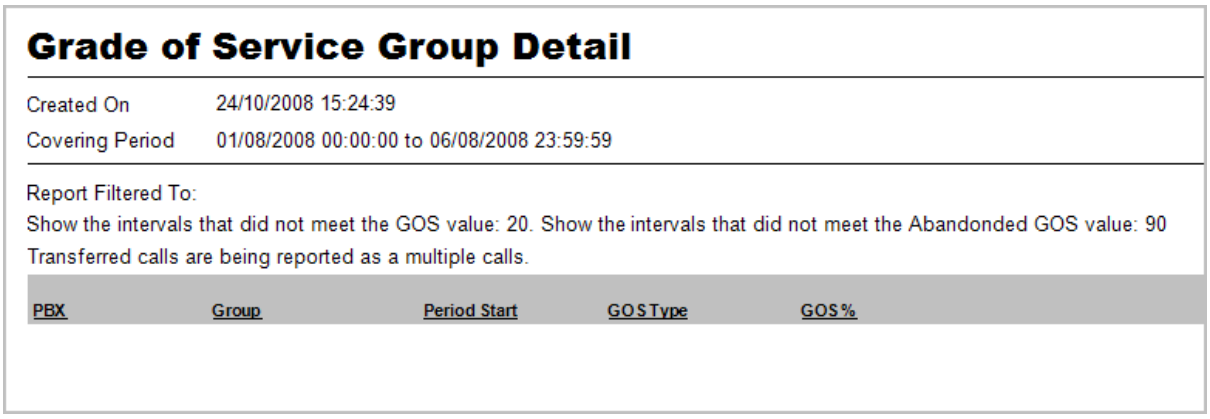
Interval Period	Number of Calls			Logged On		Unavailable		Wrapup		DND	
	Inc.	Abd.	Out.	Min.	Max.	Min.	Max.	Min.	Max.	Min.	Max.
01/08/2008 09:00:00 - 01/08/2008 10:00:00	1	0	2	0	1	0	1	0	0	0	0
01/08/2008 10:00:00 - 01/08/2008 11:00:00	3	0	1	1	2	1	1	0	1	0	0
01/08/2008 11:00:00 - 01/08/2008 12:00:00	5	1	1	2	2	0	1	0	1	0	0
01/08/2008 12:00:00 - 01/08/2008 13:00:00	2	2	2	2	2	0	1	0	1	0	0
01/08/2008 13:00:00 - 01/08/2008 14:00:00	2	2	2	2	2	1	1	0	0	0	0
01/08/2008 14:00:00 - 01/08/2008 15:00:00	2	0	2	2	2	1	1	0	0	0	0
01/08/2008 15:00:00 - 01/08/2008 16:00:00	3	0	5	2	2	0	1	0	0	0	0
01/08/2008 16:00:00 - 01/08/2008 17:00:00	4	0	3	1	2	0	0	0	0	0	0
01/08/2008 17:00:00 - 01/08/2008 18:00:00	1	0	0	0	1	0	0	0	0	0	0
01/08/2008 18:00:00 - 01/08/2008 19:00:00	0	0	0	0	0	0	0	0	0	0	0

Performance Reports

Grade of service Group detail

This report shows a breakdown of the percentage of groups which met or exceeded target grade of service for duration and abandoned calls in half hour intervals throughout the reporting period.





Grade of Service Group Detail

Created On 24/10/2008 15:24:39

Covering Period 01/08/2008 00:00:00 to 06/08/2008 23:59:59

Report Filtered To:

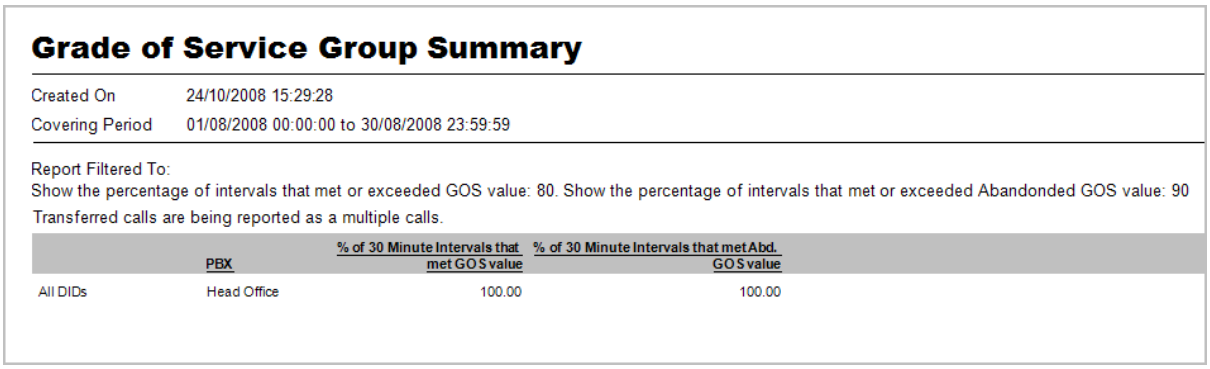
Show the intervals that did not meet the GOS value: 20. Show the intervals that did not meet the Abandonded GOS value: 90

Transferred calls are being reported as a multiple calls.

PBX	Group	Period Start	GOS Type	GOS %

Grade of service group summary

This report shows a summary of the percentage of groups which met or exceeded target grade of service for duration and abandoned calls



Grade of Service Group Summary

Created On 24/10/2008 15:29:28

Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

Report Filtered To:

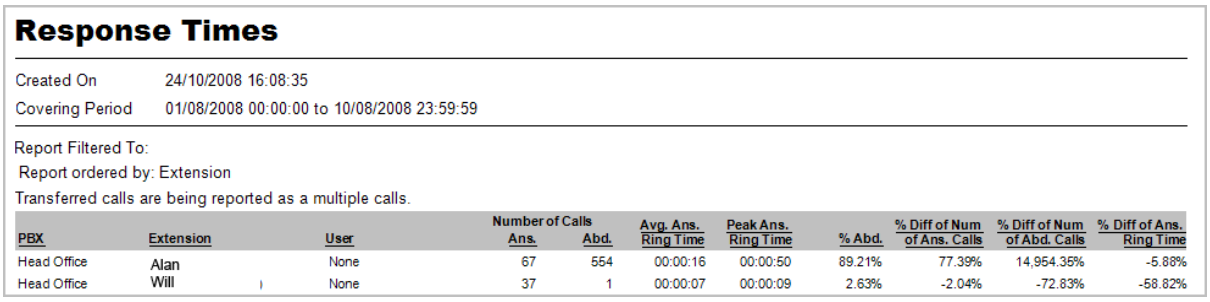
Show the percentage of intervals that met or exceeded GOS value: 80. Show the percentage of intervals that met or exceeded Abandonded GOS value: 90

Transferred calls are being reported as a multiple calls.

	PBX	% of 30 Minute Intervals that met GOS value	% of 30 Minute Intervals that met Abd. GOS value
All DIDs	Head Office	100.00	100.00

Response times

Lists for each extension the number of answered calls, abandoned calls and a relative percentage of how each extension response time compares with the rest of the group.



Response Times

Created On 24/10/2008 16:08:35
Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

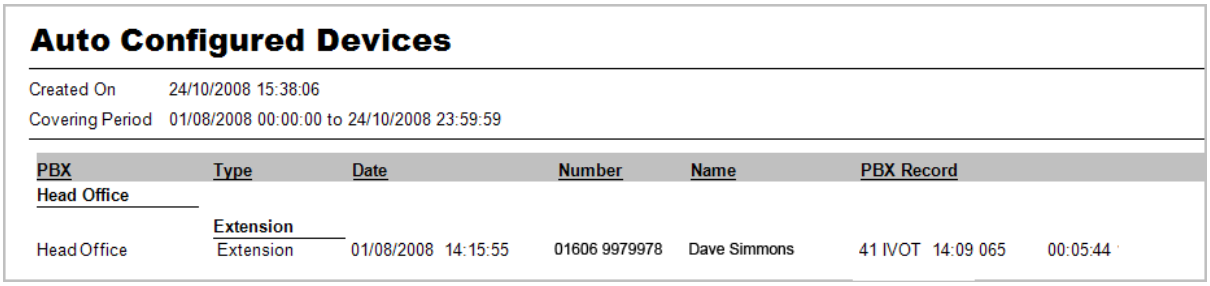
Report Filtered To:
Report ordered by: Extension
Transferred calls are being reported as a multiple calls.

PBX	Extension	User	Number of Calls Ans.	Abd.	Avg. Ans. Ring Time	Peak Ans. Ring Time	% Abd.	% Diff of Num of Ans. Calls	% Diff of Num of Abd. Calls	% Diff of Ans. Ring Time
Head Office	Alan	None	67	554	00:00:16	00:00:50	89.21%	77.39%	14,954.35%	-5.88%
Head Office	Will	None	37	1	00:00:07	00:00:09	2.63%	-2.04%	-72.83%	-58.82%

System Reports

Alarms Raised

A list of Alarms raised during the reporting period, can be filtered by PBX



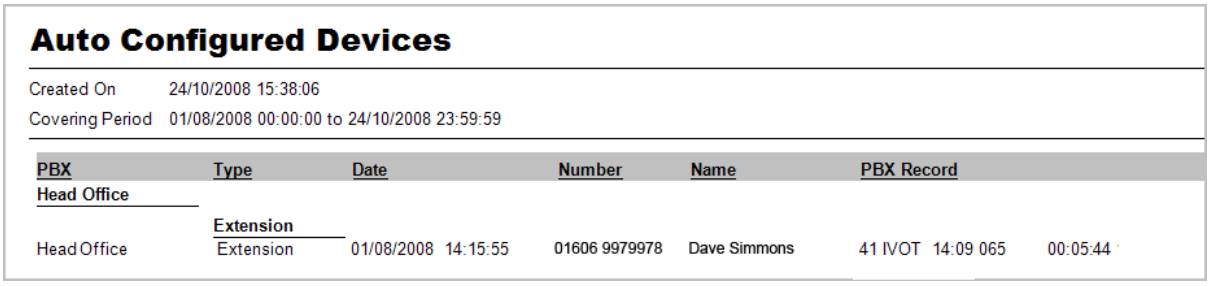
Auto Configured Devices

Created On 24/10/2008 15:38:06
Covering Period 01/08/2008 00:00:00 to 24/10/2008 23:59:59

PBX	Type	Date	Number	Name	PBX Record	
Head Office						
	Extension					
Head Office	Extension	01/08/2008 14:15:55	01606 9979978	Dave Simmons	41 IVOT 14:09 065	00:05:44

Auto Configured devices

A simple report showing all automatically configured devices during the reporting period



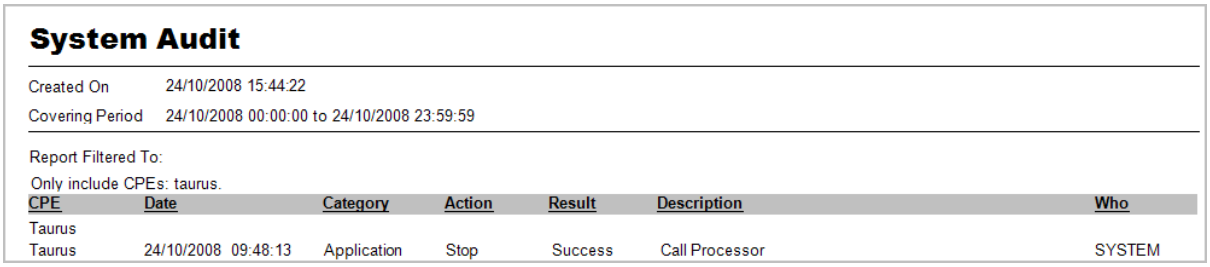
Auto Configured Devices

Created On 24/10/2008 15:38:06
Covering Period 01/08/2008 00:00:00 to 24/10/2008 23:59:59

PBX	Type	Date	Number	Name	PBX Record	
Head Office						
	Extension					
Head Office	Extension	01/08/2008 14:15:55	01606 9979978	Dave Simmons	41 IVOT 14:09 065	00:05:44

System Audit

This report shows a record of system audit entries for the duration of the reporting period. Audits are generated by the system when an event occurs such as starting or stopping of a service.



System Audit

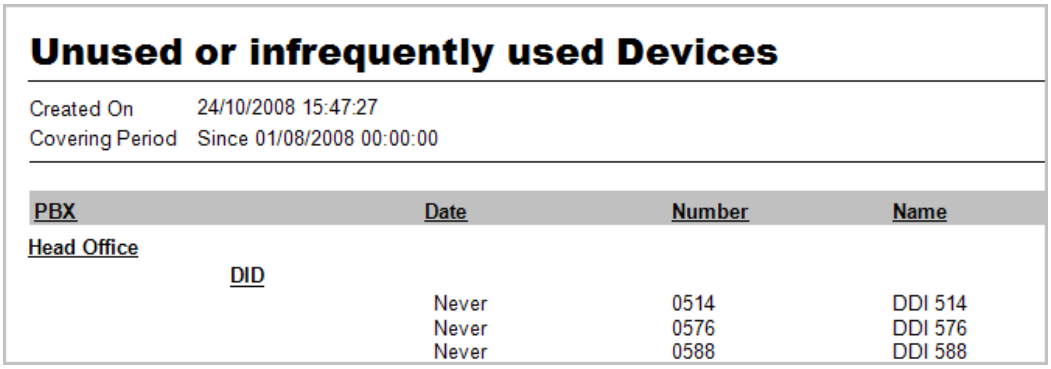
Created On 24/10/2008 15:44:22
Covering Period 24/10/2008 00:00:00 to 24/10/2008 23:59:59

Report Filtered To:
Only include CPEs: taurus.

CPE	Date	Category	Action	Result	Description	Who
Taurus						
Taurus	24/10/2008 09:48:13	Application	Stop	Success	Call Processor	SYSTEM

Unused or infrequently used devices

Allow you to keep track of devices which are infrequently used.



Unused or infrequently used Devices

Created On 24/10/2008 15:47:27
Covering Period Since 01/08/2008 00:00:00

PBX		Date	Number	Name
Head Office				
	DID			
		Never	0514	DDI 514
		Never	0576	DDI 576
		Never	0588	DDI 588

Usage Reports

Detail and Summary reports

Call detail and Group summary reports produce individual detailed statistics or cumulative statistics for calls over a defined reporting period. The standard reports can be grouped and filtered to give whatever calls or subsets of calls you require.

Call Detail reports give a breakdown of individual calls grouped by device or user and filtered as required

Time Of Call	User	Call Type	Total Duration	Tfr	Caller Name
2471					
01/08/2008 07:04:37	None	Inc	00:00:10		Heathrow Dep
01/08/2008 07:20:31	None	Out	00:02:14		
01/08/2008 09:14:06	None	Out	00:00:03		
01/08/2008 09:15:59	None	Out Abd	00:00:00		
01/08/2008 09:18:11	None	Out Abd	00:00:00		

Group Summary reports show cumulative information on device groups or user groups by call type and filtered as required

Group Summary

Created On 26/11/2008 14:16:53

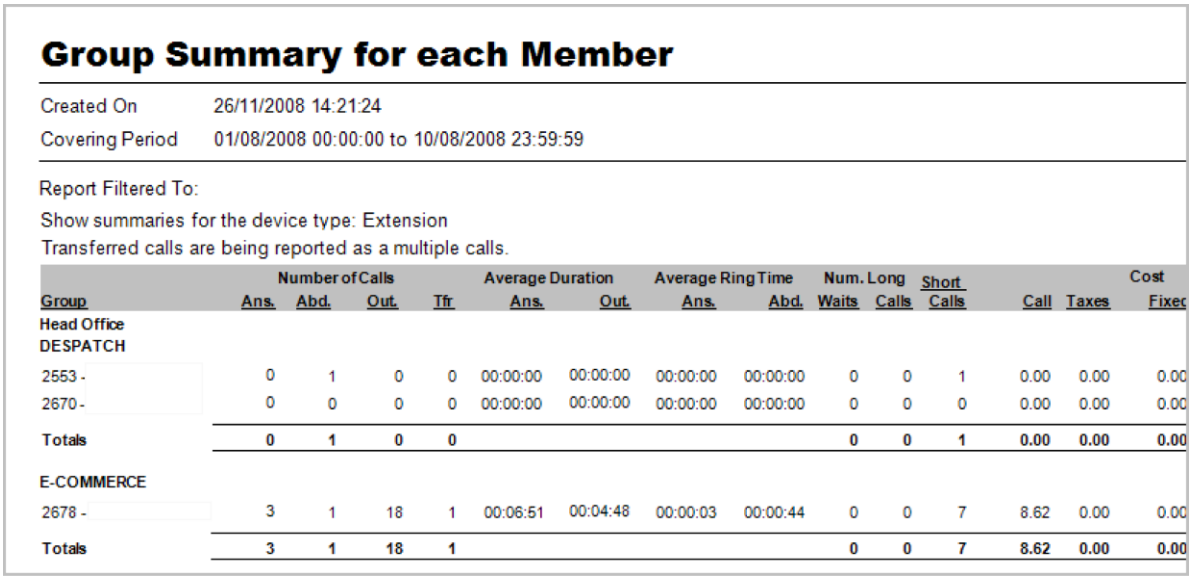
Covering Period 01/08/2008 00:00:00 to 15/08/2008 23:59:59

Report Filtered To:
Show summaries for the device type: Extension

Transferred calls are being reported as a multiple calls.

	Number of Calls				Average Duration		Average Ring Time		Num. Long		Short
Group	Ans.	Abd.	Out.	Tfr	Ans.	Out.	Ans.	Abd.	Waits	Calls	Calls
Head Office											
DESPATCH	0	20	0	0	00:00:00	00:00:00	00:00:00	00:00:02	0	0	19
E-COMMERCE	6	1	31	2	00:10:28	00:03:54	00:00:03	00:00:44	0	0	8
FINANCE	34	0	42	11	00:01:17	00:02:24	00:00:07	00:00:00	0	0	5
IT DEPT	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0
MARKETING	75	12	49	8	00:01:37	00:02:07	00:00:07	00:00:25	0	0	10
OPERATIONS	484	6	72	110	00:01:56	00:01:06	00:00:15	00:00:02	0	0	30
PRODUCT	281	1	117	17	00:03:06	00:01:41	00:00:22	00:00:01	0	0	26

Group Summary by Member shows cumulative call information for each member of a group or groups and filtered as required



Group Summary for each Member

Created On 26/11/2008 14:21:24

Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:

Show summaries for the device type: Extension

Transferred calls are being reported as a multiple calls.

	Number of Calls				Average Duration		Average Ring Time		Num. Long		Short			Cost
Group	Ans.	Abd.	Out.	Tfr	Ans.	Out.	Ans.	Abd.	Waits	Calls	Calls	Call	Taxes	Fixed
Head Office														
DESPATCH														
2553 -	0	1	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	1	0.00	0.00	0.00
2670 -	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0.00	0.00	0.00
Totals	**0**	**1**	**0**	**0**					**0**	**0**	**1**	**0.00**	**0.00**	**0.00**
E-COMMERCE														
2678 -	3	1	18	1	00:06:51	00:04:48	00:00:03	00:00:44	0	0	7	8.62	0.00	0.00
Totals	**3**	**1**	**18**	**1**					**0**	**0**	**7**	**8.62**	**0.00**	**0.00**

How to: Configure a call details or group summary Report

1) Select the report item or template
2) Configure the reporting period
3) Configure the grouping and ordering settings according to the specific report being configured
4) Configure the filtering settings
5) 'Save' and run the report

Call detail reports show the following statistics

- Time of call
- User
- Call type
- Total Duration*
- TFR**
- Caller Name
- Dialled Number
- Location
- Ring time
- Handling cost
- Call cost
- Total cost

*Total Duration shows duration of each leg of a transferred call. If transfers are consolidated then this indicates the cumulative total of all transfers for that call.

**TFR indicates the leg of the transferred call where the initial leg of the call is TFR=1. If the transfers are consolidated then this column indicates the count of transfer legs.

Group Summary reports show the following statistics

- Number of calls: Answered, Abandoned, Outgoing, Transferred
- Average Duration: Answered, Outgoing
- Average Ring time: Answered, Abandoned
- Number of Long waits
- Number of long calls
- Number of short calls
- Costs: Call costs, Taxes, Fixed costs, Handling costs, Total costs, Profit

Reports involving time intervals and profiles

Several report templates have been specifically designed to provide statistics broken down and analysed in definable time periods.

There are three basic report templates which do this

- Summary Time Distribution
- Summary over same time interval
- Summary comparison

Time Intervals v Reporting period

The reports for time distribution, time interval and profile require two distinct settings related to time intervals

The reporting period: Defines the start and end date during which the data for the report was recorded. For example we may want to view a report for the month of August or for the past six months or for the past two days. These are all reporting periods and they are configured as the first part of the report wizard as described in the relevant section above.

The statistical interval(s) describe the intervals of time over which the summarized results are calculated. An example might be where we show a breakdown of incoming calls for each day for the month of August. The statistical interval would therefore be 'Daily' whereas the reporting period would be 1st to 30th of August.

More specific detail on the interval periods employed are explained in the following sections which describe the configuration of each type of report.

Call summary over same interval

This report gives a comparison of two call types. The example here shows Incoming and Incoming abandoned for the same period split up into day of week totals. The reporting period is over 1 month (August 2008) so the totals for each 'Monday' represent a total of all calls received on all Mondays during the reporting period.

Call Summary over same Interval

Created On 23/10/2008 15:42:26
Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

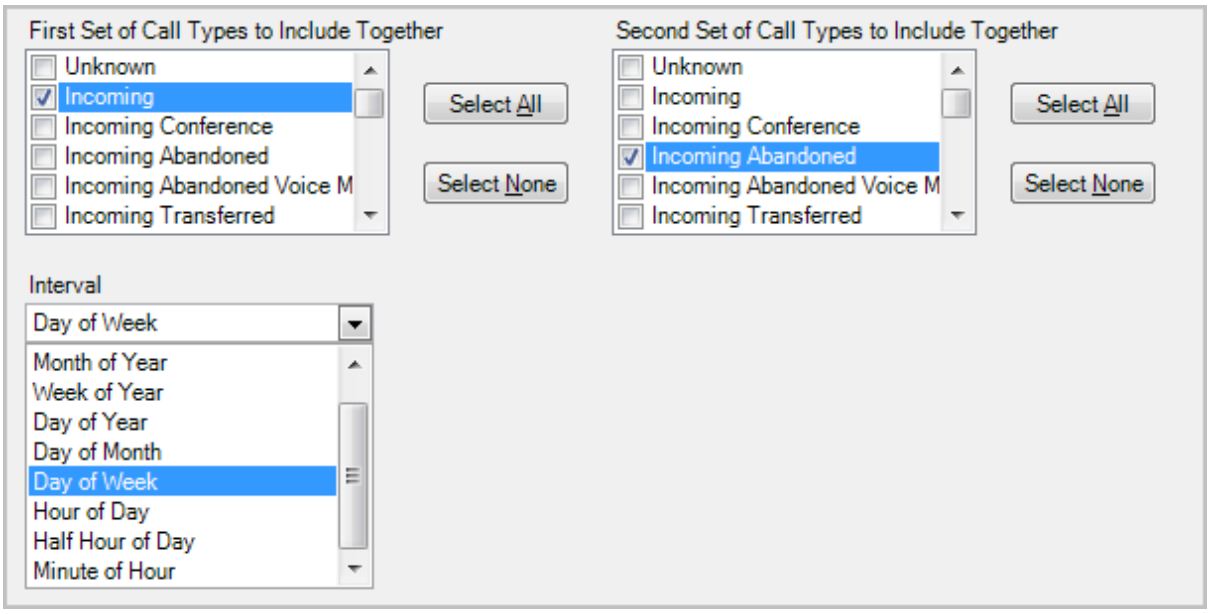
Report Filtered To:
Call types used for first value set are: Incoming.Call types used for second value set are: Incoming Abandoned. Report grouped by: Day of Week. Report ordered by: Interval
Transferred calls are being reported as a multiple calls.

	Incoming					Incoming Abandoned				
Interval Period	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
Monday	4,807	00:04:20	00:00:16	00:46:10	00:02:21	778	00:10:58	00:01:07	00:00:00	00:00:00
Tuesday	5,657	00:06:05	00:00:16	01:06:46	00:02:28	584	00:04:36	00:00:40	00:00:00	00:00:00
Wednesday	4,742	00:04:12	00:00:14	00:34:32	00:02:20	379	00:06:37	00:00:36	00:00:00	00:00:00
Thursday	4,474	00:05:31	00:00:15	01:02:56	00:02:28	423	00:05:55	00:00:46	00:00:00	00:00:00
Friday	5,340	00:03:43	00:00:14	00:45:00	00:02:22	507	00:05:00	00:00:36	00:00:00	00:00:00
Saturday	3,156	00:06:15	00:00:18	01:23:41	00:02:32	638	00:05:01	00:00:57	00:00:00	00:00:00
Sunday	915	00:01:27	00:00:02	00:31:49	00:01:11	34	00:01:02	00:00:14	00:00:00	00:00:00

Configuring the call types and interval periods requires you to select two sets of call types. Each set of call types can have more than one call type selected but the resulting totals will add all values for the selected call types into one total e.g. if you select incoming and incoming transferred these calls will be added together to produce a single total value for the call-type-set.

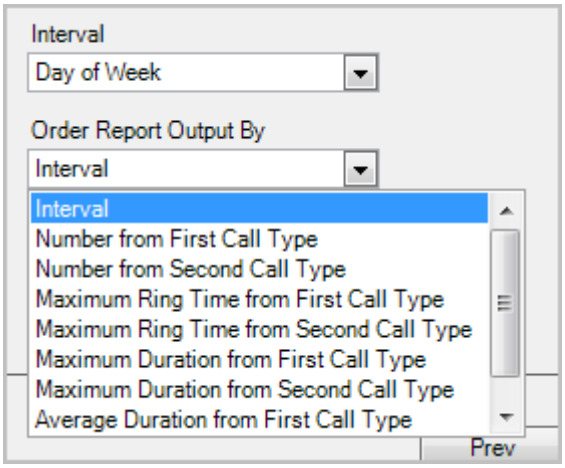
The Interval period e.g. Day of Week is selected from a drop down menu during configuration of the report and includes:

- Minute of hour: 1 to 60
- Half hour of day: 00:00 – 00:30, 00:30 – 01:00 etc
- Hour of day: 0-1, 1-2, 2-3 etc
- Day of week: Mon, Tue, Wed etc
- Day of month: 1 – 31 etc
- Day of year: 1 – 365 (6)
- Week of year: 1 - 52
- Month of year: 1 – 12



selecting the call-type sets and Interval

Ordering the results


Interval
Day of Week
Order Report Output By
Interval
Interval
Number from First Call Type
Number from Second Call Type
Maximum Ring Time from First Call Type
Maximum Ring Time from Second Call Type
Maximum Duration from First Call Type
Maximum Duration from Second Call Type
Average Duration from First Call Type
Prev

Setting the order of results

Ordering of the resulting report can be adjusted by selecting one of the order by values. This means that the results are no longer determined by the time interval but by the field specified in the group by box. This can result in confusing results if you are not aware of the purpose for the ordering. If you were to select 'Max Ring Time' as the order by column and 'Day of week' as the interval then the first result in the report will be the day of week with the longest total ring times recorded. This means that the days of the week will probably appear out of order as example below.

Call Summary over same Interval

Created On 23/10/2008 16:31:28
Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

Report Filtered To:
Call types used for first value set are: Incoming.Call types used for second value set are: Incoming Abandoned. Report grouped by: Day of Week. Report ordered by: Maximum Ring Time from First Call Type
Transferred calls are being reported as a multiple calls.

	Incoming					Incoming Abandoned				
Interval Period	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
Saturday	3,156	00:06:15	00:00:18	01:23:41	00:02:32	638	00:05:01	00:00:57	00:00:00	00:00:00
Tuesday	5,657	00:06:05	00:00:16	01:06:46	00:02:28	584	00:04:36	00:00:40	00:00:00	00:00:00
Thursday	4,474	00:05:31	00:00:15	01:02:56	00:02:28	423	00:05:55	00:00:46	00:00:00	00:00:00
Monday	4,807	00:04:20	00:00:16	00:46:10	00:02:21	778	00:10:58	00:01:07	00:00:00	00:00:00
Wednesday	4,742	00:04:12	00:00:14	00:34:32	00:02:20	379	00:06:37	00:00:36	00:00:00	00:00:00
Friday	5,340	00:03:43	00:00:14	00:45:00	00:02:22	507	00:05:00	00:00:36	00:00:00	00:00:00
Sunday	915	00:01:27	00:00:02	00:31:49	00:01:11	34	00:01:02	00:00:14	00:00:00	00:00:00

Note in the report shown the days of the week appear out of order however if we view it from the perspective of wanting to know which days of the week during August are giving the longest wait times then this report will tell us very quickly, in this case it is Saturday, with Sunday having the shortest response time.

Call Summary Time Distribution Report

In many cases you may have a set of markers which define what the minimum, maximum and optimum times are for ring time, held time and duration of calls. You may wish to analyse how many of your calls fall inside and outside these time slots. You can use the 'Time Distribution' report to do just that.

The time Distribution report allows us to define a set of time slots starting at a particular value e.g. 10 seconds and repeating up to a final value e.g. 60 seconds at 5 second intervals. This would give us time slots as follows:

10-15 seconds

16-20 seconds

21-25 Seconds

26-30 seconds

And so on up to 60 seconds

This report will then tell us how many calls over a given reporting period fall into each of these time slots. Obviously this allows us to determine what our current operating times are and if we are operating in the target times. If not then we can use other reporting tools to determine if our target times are realistic or not.

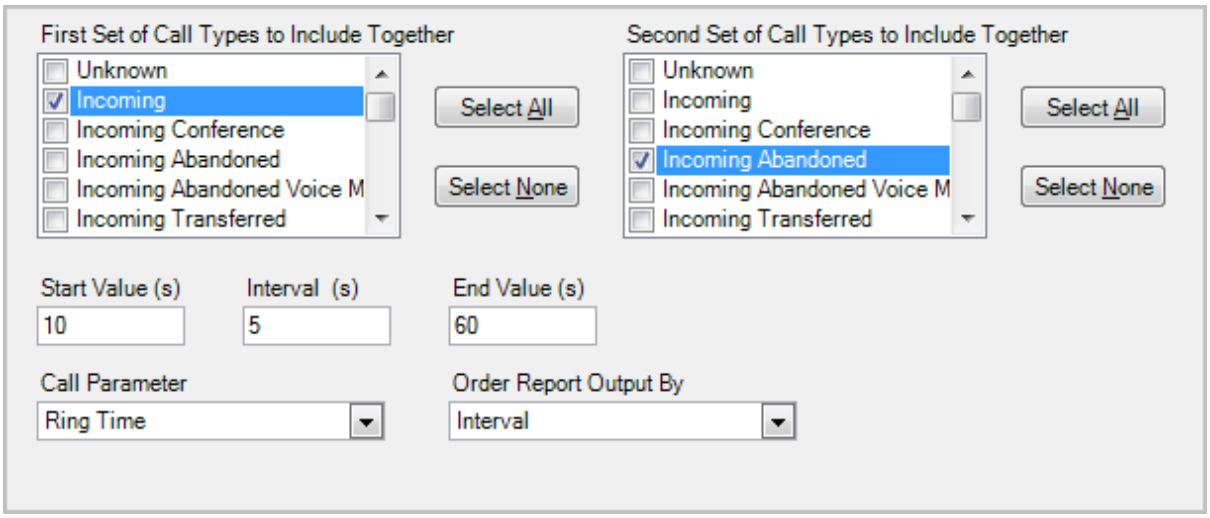
Call Summary Time Distribution

Created On 24/10/2008 10:14:20
Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:
Call types used for first value set are: Incoming.. Call types used for second value set are: Incoming Abandoned. Time Distribution for call parameter: Ring Time. Starting interval in seconds: 10. Incrementing interval in seconds: 5. Ending interval in seconds: 60. Report ordered by: Interval.
Transferred calls are being reported as a multiple calls.

	Incoming.	Incoming Abandoned
Interval Period (sec)	Number of Calls	Number of Calls
0 - 10	4,483	164
11 - 15	953	42
16 - 20	401	41
21 - 25	342	60
26 - 30	403	64
31 - 35	361	38
36 - 40	189	31
41 - 45	100	53
46 - 50	84	64
51 - 55	43	39
56 - 60	35	34
> 61	243	239

To set up the above report we would set the configuration shown.



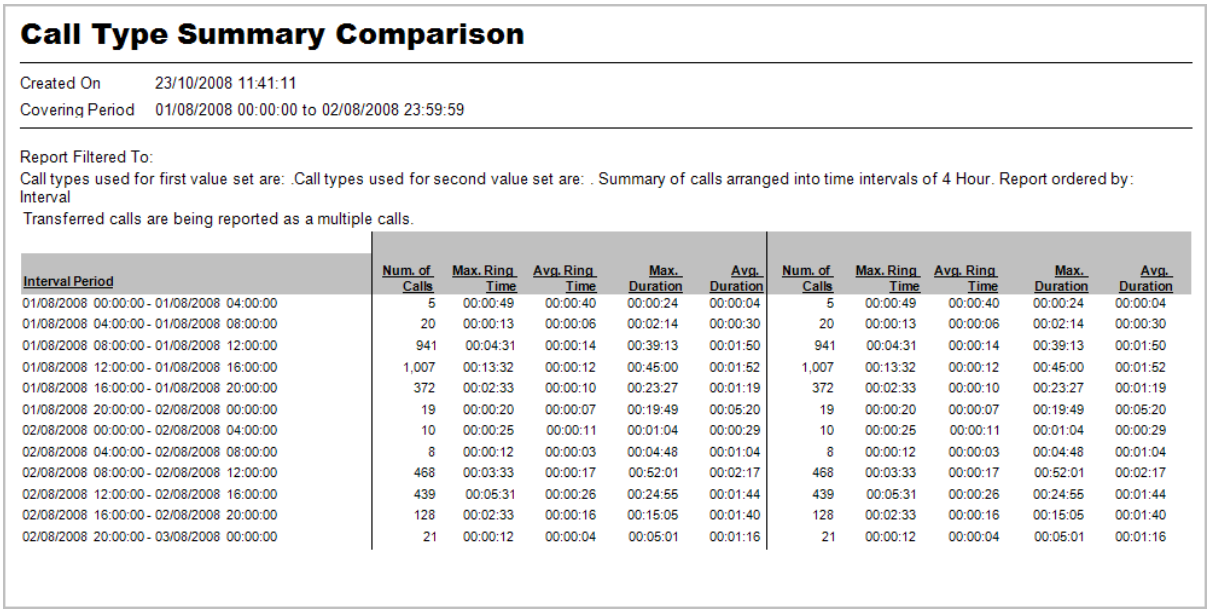
Call type summary comparison

This report allows comparison of two different calls types at regular intervals. The intervals can be multiples of:

- Minute
- Hour

- Day
- Week

The report collates statistics for the specified intervals for the duration of the reporting period.



Call Type Summary Comparison

Created On 23/10/2008 11:41:11
Covering Period 01/08/2008 00:00:00 to 02/08/2008 23:59:59

Report Filtered To:
Call types used for first value set are: .Call types used for second value set are: . Summary of calls arranged into time intervals of 4 Hour. Report ordered by: Interval
Transferred calls are being reported as a multiple calls.

Interval Period	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
01/08/2008 00:00:00 - 01/08/2008 04:00:00	5	00:00:49	00:00:40	00:00:24	00:00:04	5	00:00:49	00:00:40	00:00:24	00:00:04
01/08/2008 04:00:00 - 01/08/2008 08:00:00	20	00:00:13	00:00:06	00:02:14	00:00:30	20	00:00:13	00:00:06	00:02:14	00:00:30
01/08/2008 08:00:00 - 01/08/2008 12:00:00	941	00:04:31	00:00:14	00:39:13	00:01:50	941	00:04:31	00:00:14	00:39:13	00:01:50
01/08/2008 12:00:00 - 01/08/2008 16:00:00	1,007	00:13:32	00:00:12	00:45:00	00:01:52	1,007	00:13:32	00:00:12	00:45:00	00:01:52
01/08/2008 16:00:00 - 01/08/2008 20:00:00	372	00:02:33	00:00:10	00:23:27	00:01:19	372	00:02:33	00:00:10	00:23:27	00:01:19
01/08/2008 20:00:00 - 02/08/2008 00:00:00	19	00:00:20	00:00:07	00:19:49	00:05:20	19	00:00:20	00:00:07	00:19:49	00:05:20
02/08/2008 00:00:00 - 02/08/2008 04:00:00	10	00:00:25	00:00:11	00:01:04	00:00:29	10	00:00:25	00:00:11	00:01:04	00:00:29
02/08/2008 04:00:00 - 02/08/2008 08:00:00	8	00:00:12	00:00:03	00:04:48	00:01:04	8	00:00:12	00:00:03	00:04:48	00:01:04
02/08/2008 08:00:00 - 02/08/2008 12:00:00	468	00:03:33	00:00:17	00:52:01	00:02:17	468	00:03:33	00:00:17	00:52:01	00:02:17
02/08/2008 12:00:00 - 02/08/2008 16:00:00	439	00:05:31	00:00:26	00:24:55	00:01:44	439	00:05:31	00:00:26	00:24:55	00:01:44
02/08/2008 16:00:00 - 02/08/2008 20:00:00	128	00:02:33	00:00:16	00:15:05	00:01:40	128	00:02:33	00:00:16	00:15:05	00:01:40
02/08/2008 20:00:00 - 03/08/2008 00:00:00	21	00:00:12	00:00:04	00:05:01	00:01:16	21	00:00:12	00:00:04	00:05:01	00:01:16

Configuration requires you to set the Interval count and the interval value. For example an interval count of 4 and an interval setting of Hour will give a report statistic calculated every 4 hours.

Ordering can be based on:

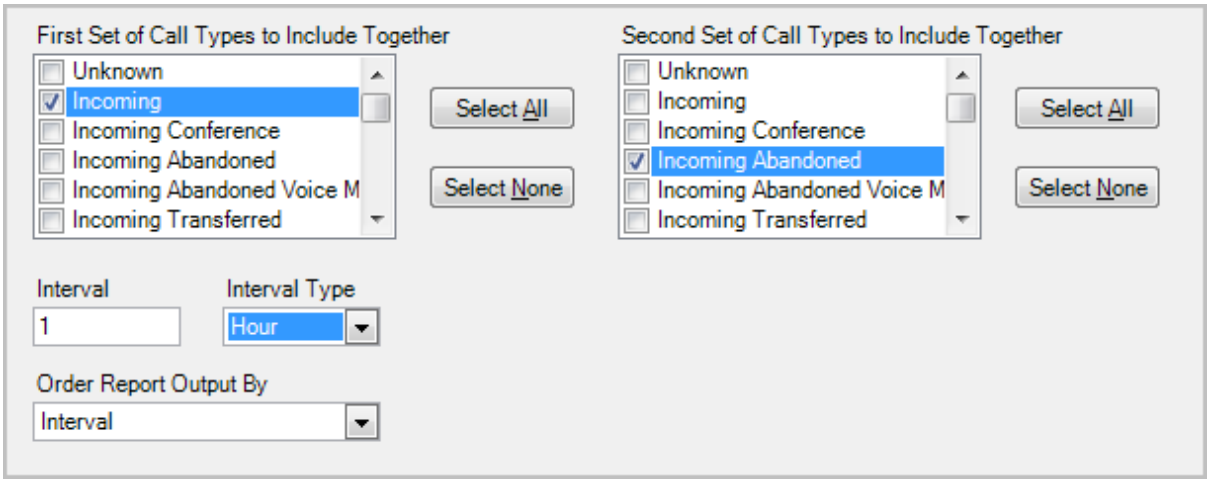
The specified interval (Default)

Number from 1st or 2nd call type

Maximum ring from 1st or 2nd call type

Maximum Duration from the 1st or 2nd call type

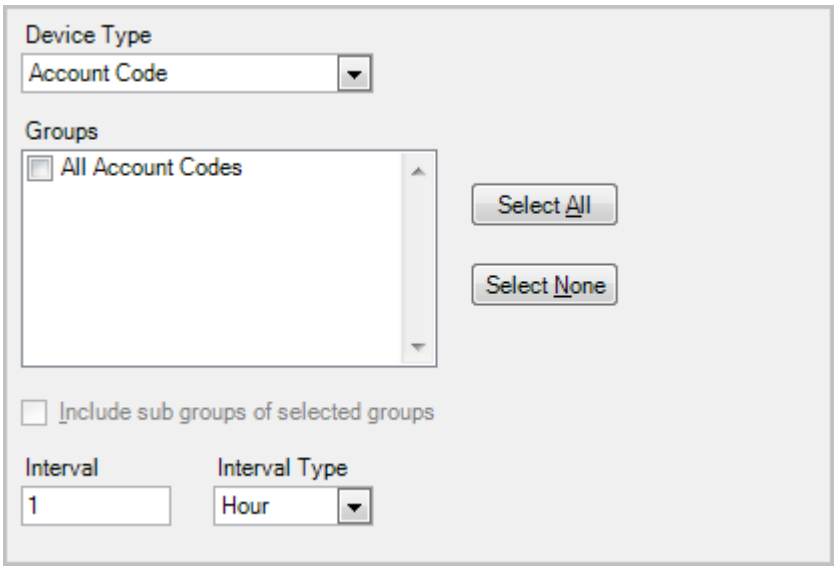
Average duration from 1st or 2nd call type

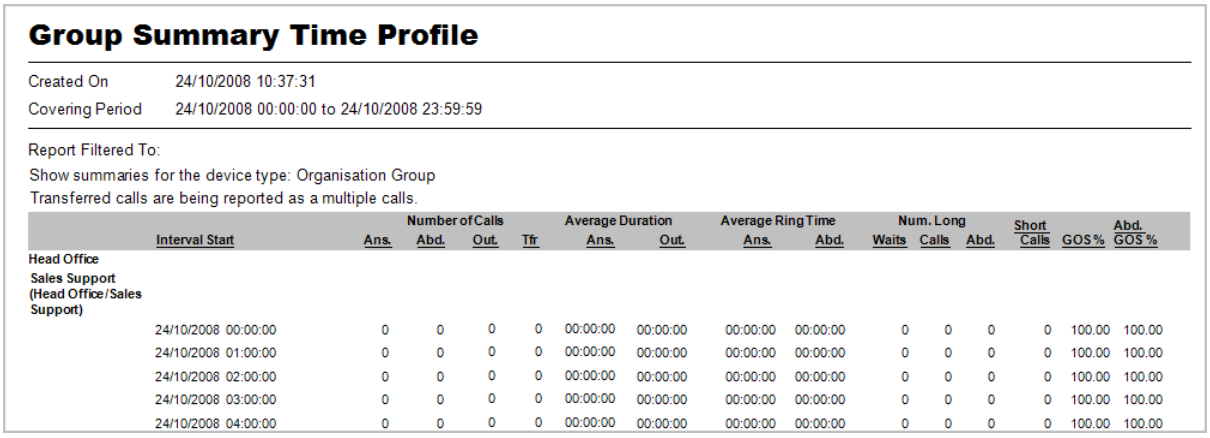


Group Summary time profile

This report gives a group summary presented at specified time intervals. The time interval settings are specified as the interval count and the interval value (as per the previous 'call type summary comparison' report.

The difference with this report is that you specify a group of devices to report against as shown below.





Group Summary Time Profile

Created On 24/10/2008 10:37:31
Covering Period 24/10/2008 00:00:00 to 24/10/2008 23:59:59

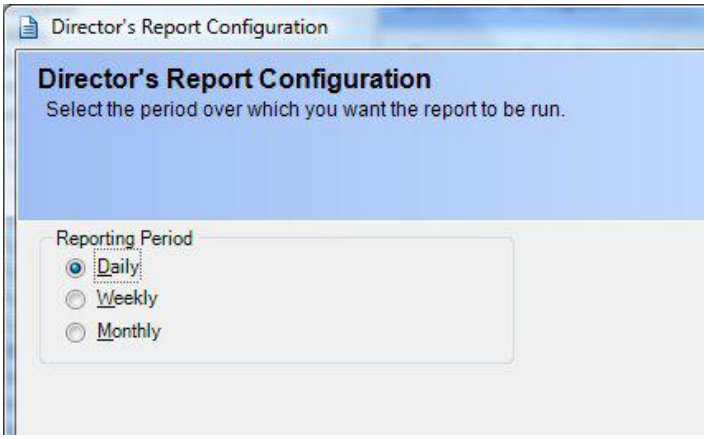
Report Filtered To:
Show summaries for the device type: Organisation Group
Transferred calls are being reported as a multiple calls.

		Number of Calls				Average Duration		Average Ring Time		Num. Long			Short		Abd.
	Interval Start	Ans.	Abd.	Out.	Tfr	Ans.	Out.	Ans.	Abd.	Waits	Calls	Abd.	Calls	GOS %	GOS %
Head Office															
Sales Support (Head Office/Sales Support)															
	24/10/2008 00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 01:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 02:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 03:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 04:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00

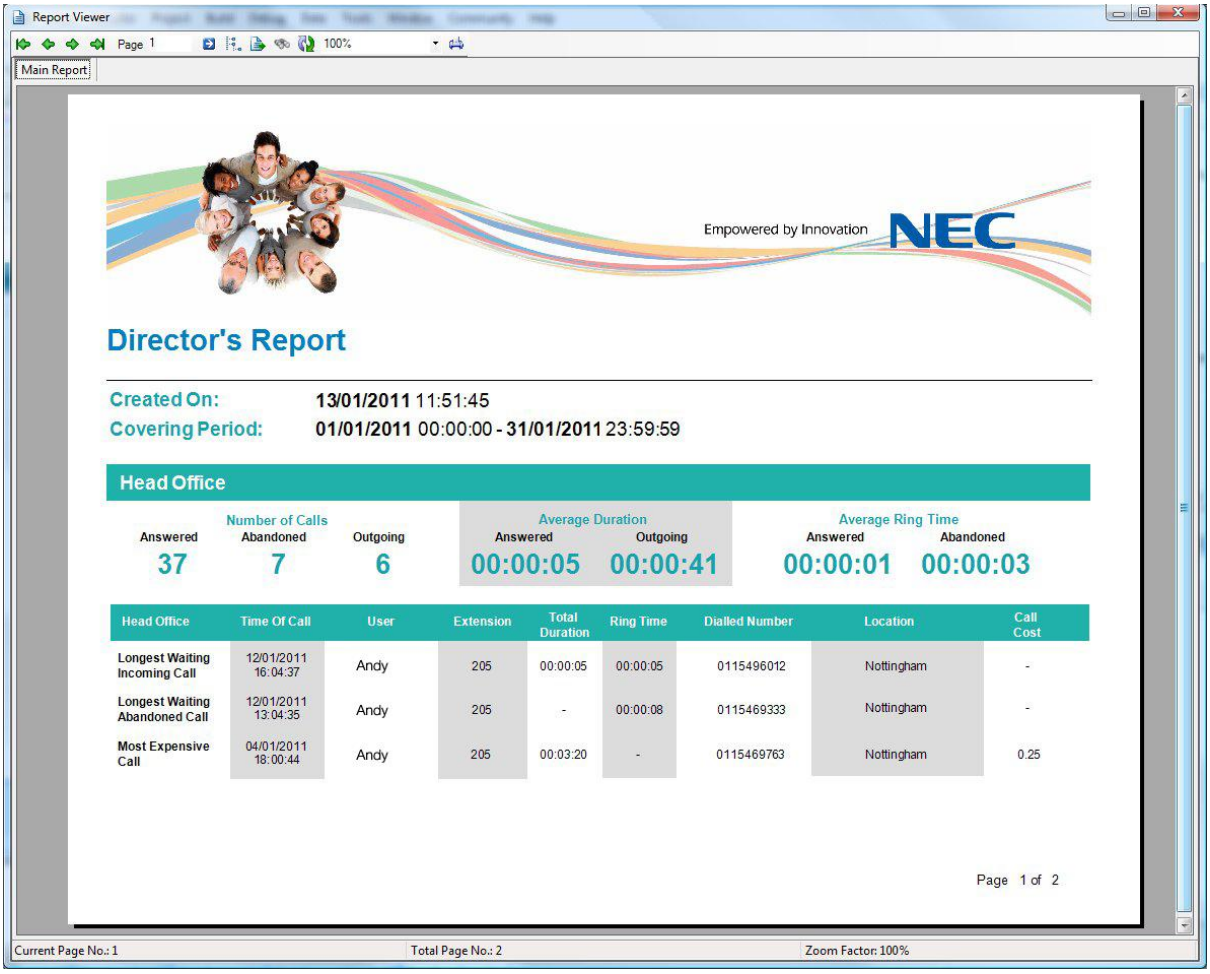
Special Usage Reports

Directors Report

This report gives a general summary of call activity for daily, Weekly and Monthly periods. Select Directors report from the usage templates and select the reporting period from the wizard screen.



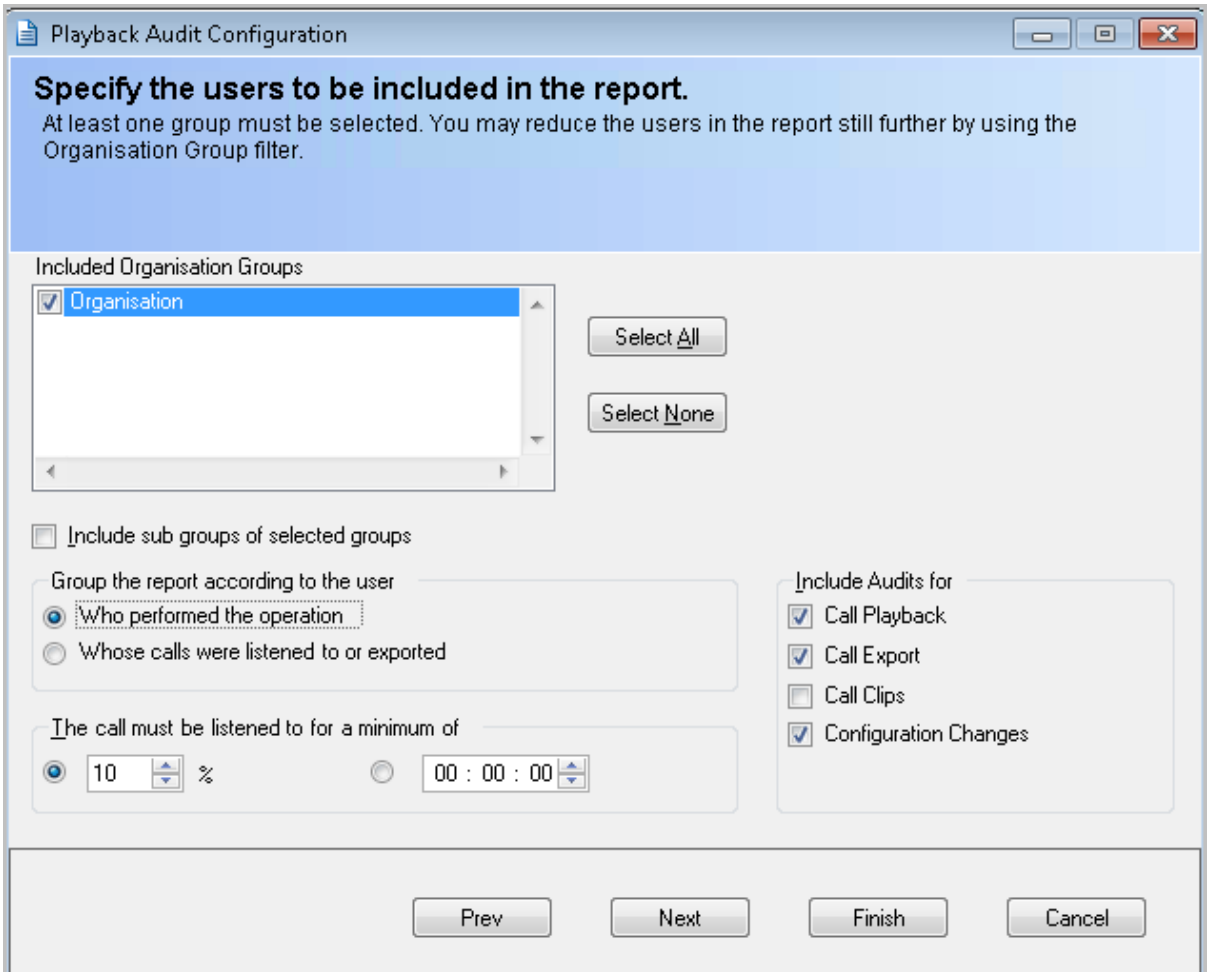
Click Finish and the report will be generated


Report Viewer
Page 1
100%
Main Report
Empowered by Innovation
NEC
Director's Report
Created On: 13/01/2011 11:51:45
Covering Period: 01/01/2011 00:00:00 - 31/01/2011 23:59:59
Head Office
Number of Calls
Answered 37
Abandoned 7
Outgoing 6
Average Duration
Answered 00:00:05
Outgoing 00:00:41
Average Ring Time
Answered 00:00:01
Abandoned 00:00:03
Head Office | Time Of Call | User | Extension | Total Duration | Ring Time | Dialled Number | Location | Call Cost
Longest Waiting Incoming Call | 12/01/2011 16:04:37 | Andy | 205 | 00:00:05 | 00:00:05 | 0115496012 | Nottingham | -
Longest Waiting Abandoned Call | 12/01/2011 13:04:35 | Andy | 205 | - | 00:00:08 | 0115469333 | Nottingham | -
Most Expensive Call | 04/01/2011 18:00:44 | Andy | 205 | 00:03:20 | - | 0115469763 | Nottingham | 0.25
Page 1 of 2
Current Page No.: 1
Total Page No.: 2
Zoom Factor: 100%

The report includes the Number of calls, Average Duration and Average ring time statistics along with the longest waiting periods for incoming and incoming abandoned calls as well as the most expensive call made during the period.

Playback Audit

This report will provide a list of playback activity audits over a given reporting period.


Playback Audit Configuration
Specify the users to be included in the report.
At least one group must be selected. You may reduce the users in the report still further by using the Organisation Group filter.
Included Organisation Groups
Organisation
Select All
Select None
Include sub groups of selected groups
Group the report according to the user
Who performed the operation
Whose calls were listened to or exported
Include Audits for
Call Playback
Call Export
Call Clips
Configuration Changes
The call must be listened to for a minimum of
10
%
00 : 00 : 00
Prev
Next
Finish
Cancel

The report is configured using the wizard screen above.

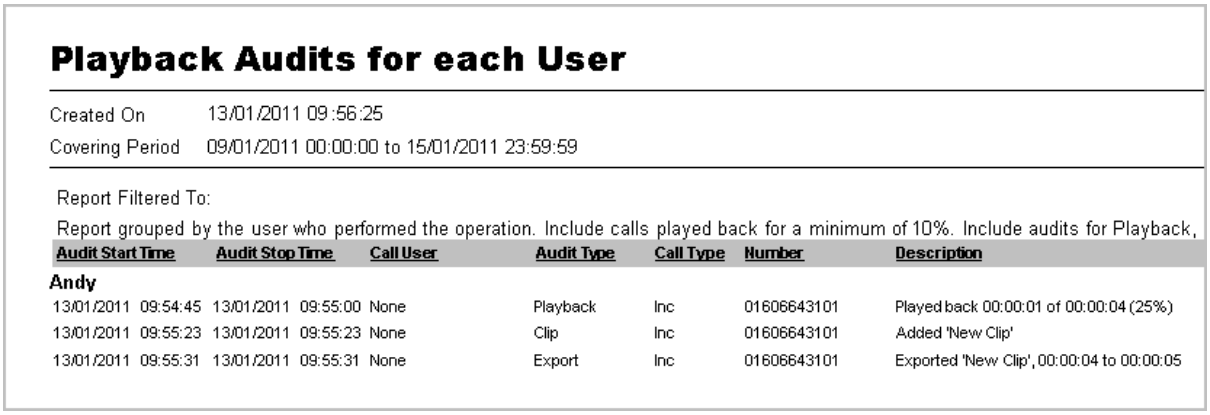
Included Organisation groups: Define the groups of users you wish to see the audits for.

Include sub groups of selected groups: Includes all users belonging to sub groups of the groups you have selected.

Group according to: Results can be grouped together based on either the user who performed the operation or the user whose calls were listened to or exported.

You can define the type of audits to be included by selecting the appropriate checkbox.

There is also an option to eliminate calls which were listened to for less than a specified amount of time which can be expressed as a percentage of the call length or as an absolute time in hours, minutes and seconds.



Playback Audits for each User

Created On 13/01/2011 09:56:25
Covering Period 09/01/2011 00:00:00 to 15/01/2011 23:59:59

Report Filtered To:
Report grouped by the user who performed the operation. Include calls played back for a minimum of 10%. Include audits for Playback,

Audit Start Time	Audit Stop Time	Call User	Audit Type	Call Type	Number	Description
Andy						
13/01/2011 09:54:45	13/01/2011 09:55:00	None	Playback	Inc	01606643101	Played back 00:00:01 of 00:00:04 (25%)
13/01/2011 09:55:23	13/01/2011 09:55:23	None	Clip	Inc	01606643101	Added 'New Clip'
13/01/2011 09:55:31	13/01/2011 09:55:31	None	Export	Inc	01606643101	Exported 'New Clip', 00:00:04 to 00:00:05

Trunk Utilization Report

Provides statistics on trunk utilization over specified time intervals during the reporting period

Statistics displayed are

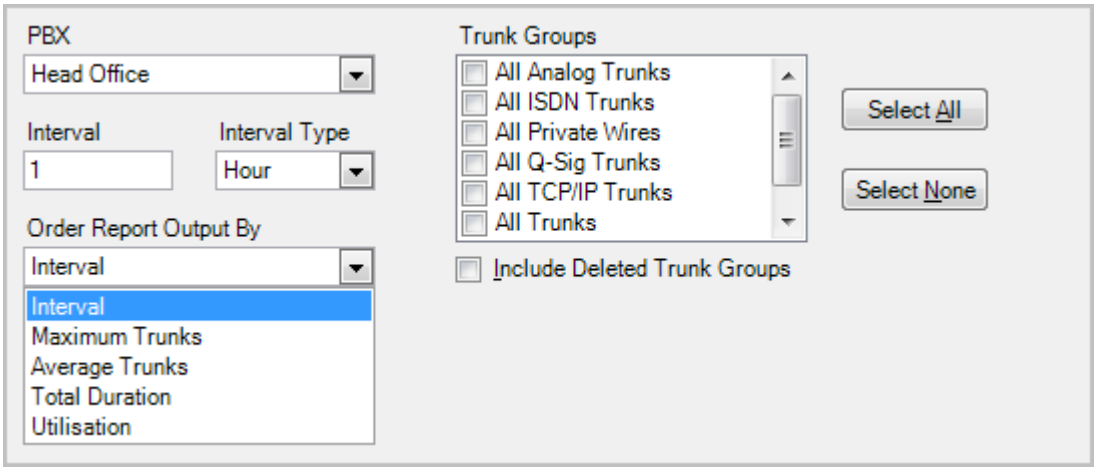
Interval period: set in the configuration

Maximum trunks: Maximum number of trunks used at any one time during the interval

First time at maximum: When the maximum number of trunks was first reached

Duration: Total call duration across all trunks included in the report

% Utilisation: Percentage usage of trunks for the interval versus total trunks



Trunk Utilisation

Created On 24/10/2008 11:48:04

Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

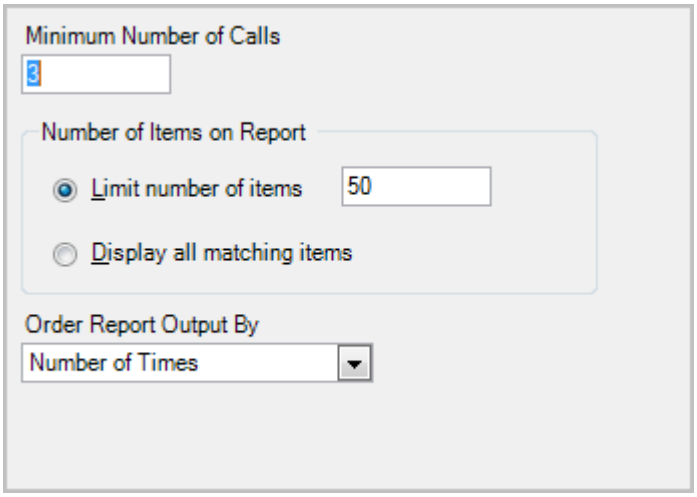
Report Filtered To:
Only include PBX: Head Office
Only include trunk groups: All ISDN Trunks.
Summary of trunk activity arranged into time intervals of 1 Day. Report ordered by: Interval

Interval Period	Maximum Trunks	First Time at Maximum	Duration	% Utilisation
01/08/2008 00:00:00 - 02/08/2008 00:00:00	20	01/08/2008 15:08:06	70:35:40	3.00
02/08/2008 00:00:00 - 03/08/2008 00:00:00	13	02/08/2008 10:22:24	34:55:05	1.00
03/08/2008 00:00:00 - 04/08/2008 00:00:00	4	03/08/2008 10:02:03	08:19:47	0.00
04/08/2008 00:00:00 - 05/08/2008 00:00:00	26	04/08/2008 10:29:30	101:38:09	4.00
05/08/2008 00:00:00 - 06/08/2008 00:00:00	20	05/08/2008 13:36:25	94:17:26	4.00
06/08/2008 00:00:00 - 07/08/2008 00:00:00	21	06/08/2008 11:53:58	83:11:43	4.00
07/08/2008 00:00:00 - 08/08/2008 00:00:00	19	07/08/2008 15:21:51	74:21:12	3.00
08/08/2008 00:00:00 - 09/08/2008 00:00:00	20	08/08/2008 10:48:08	73:01:47	3.00
09/08/2008 00:00:00 - 10/08/2008 00:00:00	11	09/08/2008 09:57:21	35:08:13	1.00
10/08/2008 00:00:00 - 11/08/2008 00:00:00	3	10/08/2008 15:52:35	02:23:49	0.00
11/08/2008 00:00:00 - 11/08/2008 00:00:00	0		00:00:00	0.00

Most frequent calls

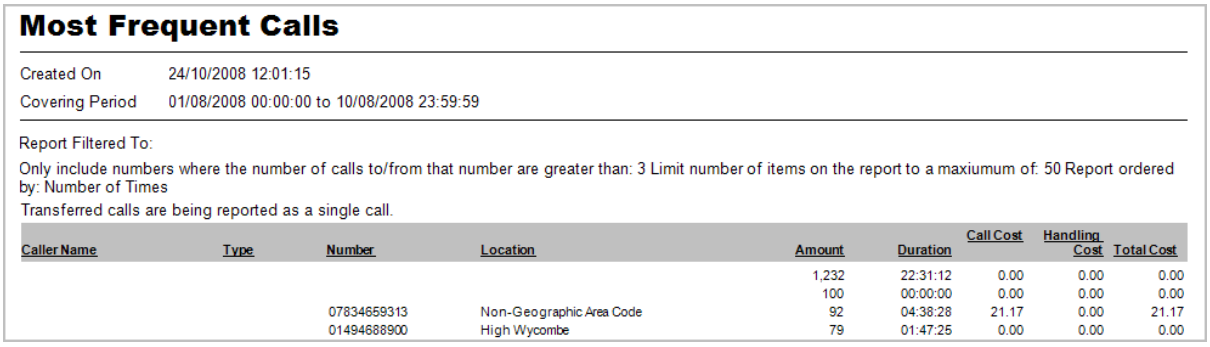
Gives details of which numbers have been handled most frequently for both incoming and outgoing.

You can specify a minimum number of calls before a number is included in the report



Statistics for these calls in the report are:

- Caller Name
- Call type
- Number
- Location
- Amount
- Total duration of calls to and from that number
- Cost and total cost of calls to that number



Most Frequent Calls

Created On 24/10/2008 12:01:15

Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:

Only include numbers where the number of calls to/from that number are greater than: 3 Limit number of items on the report to a maxiumum of: 50 Report ordered by: Number of Times

Transferred calls are being reported as a single call.

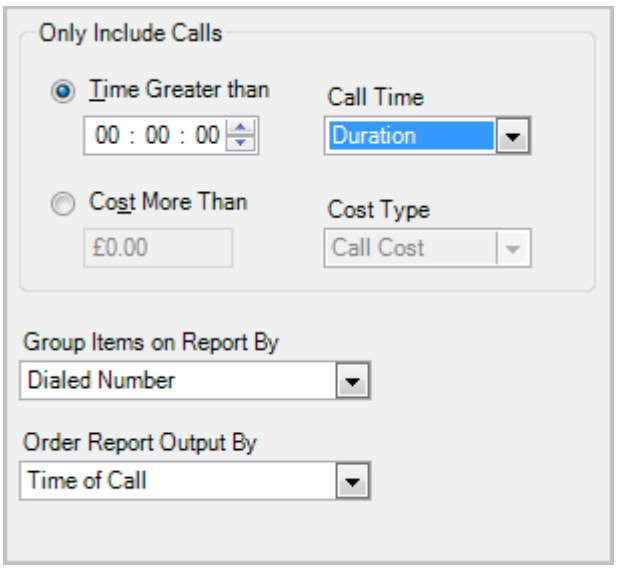
Caller Name	Type	Number	Location	Amount	Duration	Call Cost	Handling Cost	Total Cost
				1,232	22:31:12	0.00	0.00	0.00
				100	00:00:00	0.00	0.00	0.00
		07834659313	Non-Geographic Area Code	92	04:38:28	21.17	0.00	21.17
		01494688900	High Wycombe	79	01:47:25	0.00	0.00	0.00

Top Calls

Provides information listing the calls with Duration, Held time or Ring time greater than a defined value or calls with a call cost or handling cost of greater than a defined value.

Statistics for these calls in the report are:

- Time of call
- PBX
- Extension
- User
- Duration
- Dialled Number
- Location
- Ring Time
- Call Cost
- Handling Cost
- Total Cost



Custom Reports

What is a Custom Report

A custom report allows you to specify precisely what information you want to include in the report fields. For example if you require a report which does not show costing information in a call details report then a custom report can be configured to accomplish that.

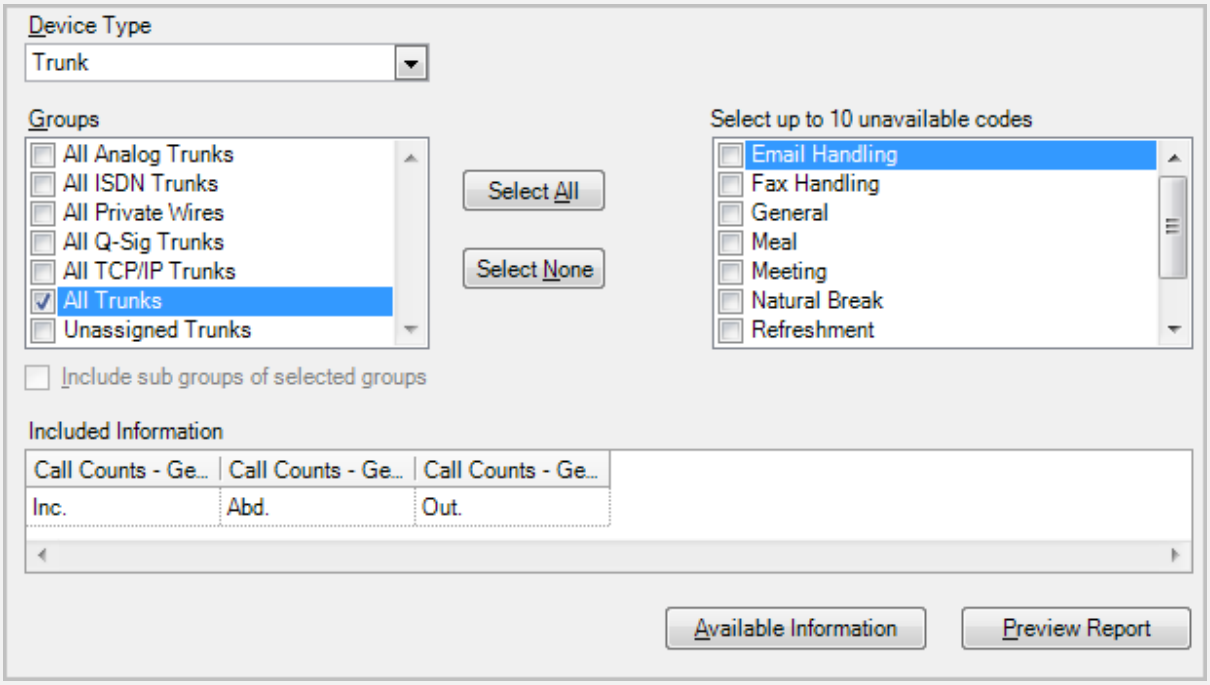
The majority of the configuration process for custom reports follows the standard report template for that type of report. There are custom reports available for the following template types

- Custom Call Details
- Custom Group Summary
- Custom Group Summary for each member
- Custom Group Summary Profile

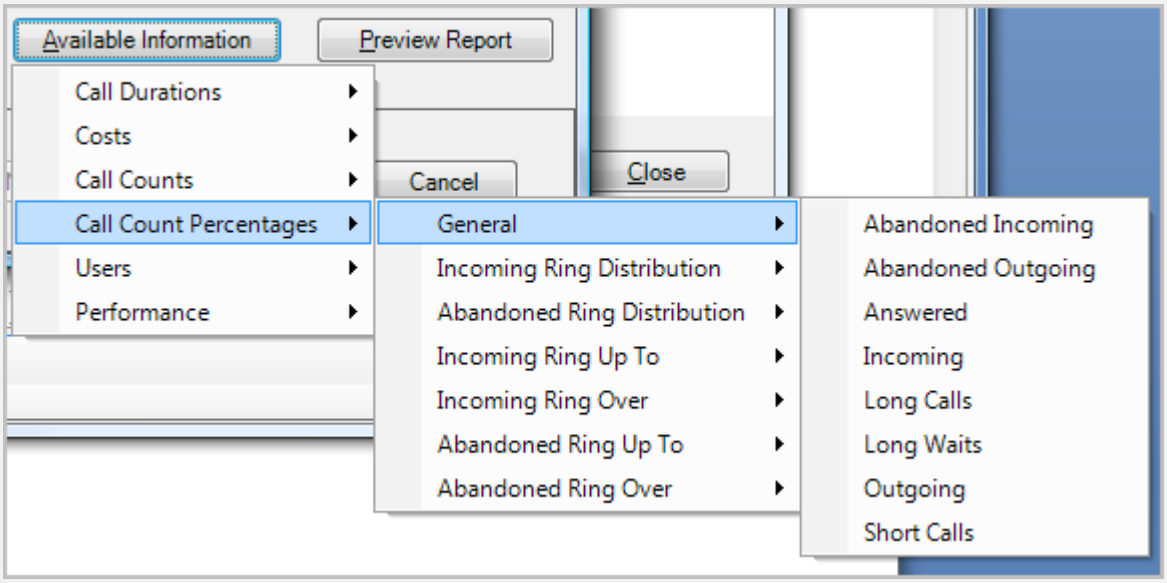
Where a custom report differs is in the choice of fields which can be shown.

How To: Setup a Custom Report

1) Create a report item based on the custom report template required
2) Configure the reporting period
3) Configure the Device Groups and devices
4) Configure the unavailable codes if required – The example screen shows the configuration for the Group Summary custom report.



5) Click on the 'Available information' button and Specify your custom fields using the menus and submenus, click on the required fields to add them to the report.



6) Drag the columns to define their order from left to right on the report.

7) If you wish you can preview the report at this time by clicking the 'Preview Report' button. You will see a resulting report which shows the columns configured but the data will not be accurate.

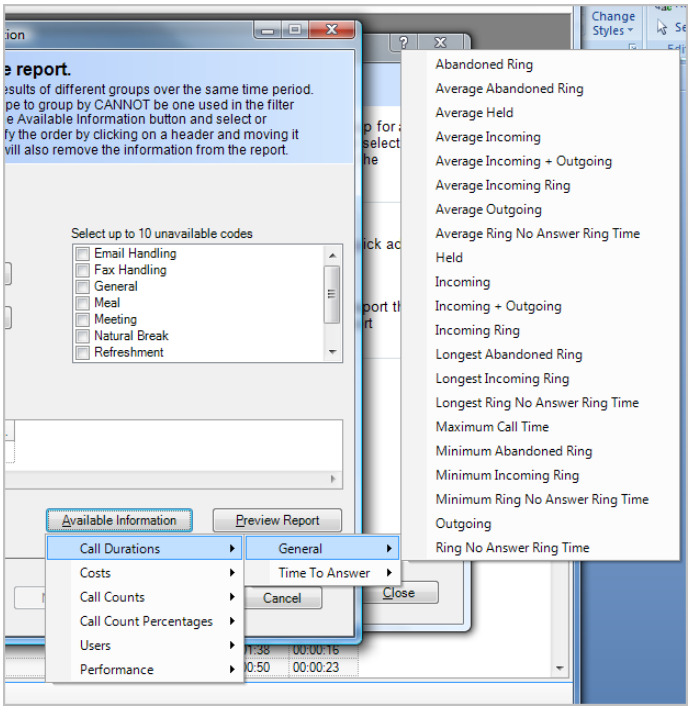
8) Complete the configuration of the rest of the report i.e. Filtering, Transfer consolidation and call types

9) Save the report item

Custom Report Parameters

Custom reports, by definition can contain a very wide range of parameters in the various report columns. Depending on the purpose of the report you will select parameters from one or more main categories. The actual parameters available for your custom report will differ depending on the custom report template you have chosen to base your report on.

Parameters can be selected from the 'Available Information' option in the custom report configuration wizard



The following is a summary of the various report parameters. A detailed definition of each parameter is to be found at the end of this section.

Custom Report Parameters fall into the following main categories.

For custom summary reports

- Call Durations
- Costs
- Call Counts
- Call Count Percentages
- Users
- Performance

For custom detail reports

- General
- Trunks
- Extension
- DIDs
- Pilot numbers
- Account codes
- Callers
- Costs
- Times
- Completion Codes

Custom Summary Reports - Call Durations

Call durations show you how long a specific type of call or how long a particular phase of a call has taken.

Call Durations - General

The call durations are broken down into:

Absolute Durations e.g. a call lasted 10 minutes or the longest call for a given extension lasted 25 minutes.

Average durations e.g. the average incoming call lasted 5 minutes

Ranges of durations – Minimum, Maximum etc.

The values available are:

- Abandoned ring
- Average abandoned ring
- Average held
- Average incoming
- Average incoming + outgoing
- Average incoming ring
- Average outgoing
- Average ring no answer ring time
- Held
- Incoming
- Incoming + outgoing
- Incoming ring
- Longest abandoned ring
- Longest incoming ring
- Longest ring no answer ring time
- Max call time
- Min abandoned ring
- Min incoming ring
- Min ring no answer time
- Outgoing
- Ring no answer time

Call Durations - Time to Answer

Gives the 'Time to Answer' a specific percentage of calls e.g. how long did it take to answer 50% of calls

Custom Summary Reports - Costs

General

- Call costs
- Fixed Costs
- Handling costs
- Max incoming call
- Max incoming handling
- Max outgoing call

- Max outgoing handling
- Overall cost
- Profit
- Taxes
- Total incoming call
- Total incoming handling
- Total outgoing call
- Total outgoing handling

Category Counts, Category Totals, Category Averages

- Free
- In state
- Incoming
- International
- Local
- Local toll
- Long distance
- Mobile
- National
- National (Generic)
- Not defined
- Special
- Unknown

Custom Summary Reports - Call Counts

Call counts for different types of calls as follows:

- Abandoned Incoming
- Abandoned Outgoing
- Handled
- Held
- Incoming
- Incoming + outgoing
- Incoming conference
- Incoming intraflow
- Incoming network
- Incoming overflow
- Long calls
- Long waits
- Offered
- Outgoing
- Outgoing conference
- Outgoing network
- Picked up
- Ring no answer
- Short calls

- Transfer count

Ring Distributions

Call count ring distributions provide a way of reporting how many calls were answered in specific time ranges e.g. how many calls were answered inside 6 – 10 seconds as opposed to 11-15 seconds. There are two distributions

Incoming ring times – Calls which were answered

Abandoned ring times – Calls which were abandoned

Custom Summary Reports - Call Count Percentages

Call count percentage values show how many calls rang up to a specific time and how many calls rang over a specific time. You have a choice of Incoming calls and Abandoned calls e.g. how many calls rang for up to 20 seconds?

Call count percentage ring distributions split the call count percentages into time intervals as follows

- Below 5 seconds
- 5 – 10 seconds
- 6 – 10 seconds
- 11 – 15 seconds
- And every 5 second interval up to 60 seconds
- Over 60 seconds

This allows analysis of the percentage of incoming and abandoned ring times falling into a given time interval

Custom Summary Reports - (ACD) Users

A series of ACD related parameters

Percentage (%) values, Total Values or Average values for:

- Time busy
- Time DND
- Time Free
- Time Unavailable
- Time Wrapup

Login information

- First Login time
- Last login time
- Logged in max
- Logged in min
- Number of logins

Custom Summary Reports - Performance

- Abandoned Grade of service

- Grade of service

Custom Detailed Reports – General

Various parameters for which usage can be calculated

- Call ID
- Call type
- Costing type
- Grouping details
- Least cost routing digits
- Location name
- Location state
- Long call
- Long wait
- PBX code
- Short call
- Telephone number
- Time of call
- Total transfers
- Transfers to this part of the call
- User name

Custom Detailed Reports – Trunks

Values relating to the trunk usage

- Destination trunk name
- Destination trunk number
- Source trunk name
- Source trunk number
- Trunk name
- Trunk number

Custom Detailed Reports – Extension

Values relating to the extension usage

- Destination extension name
- Destination extension number
- Source extension name
- Source extension number
- Extension name
- Extension number

Custom Detailed Reports – DIDs, Pilot numbers, Account codes, Callers

Values for these various devices

- Name
- Number

Custom Detailed Reports – Costs

- Call costs
- Handling costs
- Overall costs
- Profit
- Taxes
- Total call cost

Custom Detailed Reports - Times

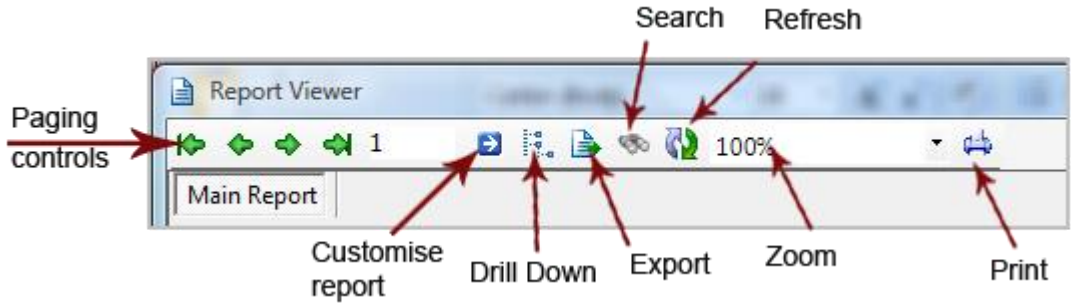
- Held time
- Ring time
- Talk time
- Total duration

Custom Detailed Reports – Completion Codes

- Completion Code level 1
- Completion Code level 2
- Completion Code level 3

Report Viewer

Once a report has been generated it is presented in the report viewer. The viewer has the following options available from its toolbar.



Paging controls: allow navigation between pages in multi-paged reports

Customise report: Provides a number of report customisations

Drill Down: allows you to drill down to more detail in the report

Export: allows export to variety of formats including CSV

Refresh: Allows updating of the report

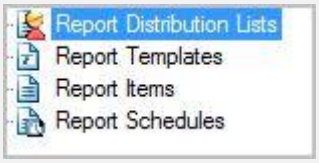
Print: Print the report

How to create a distribution list

Report Distribution Lists are the way by which a Report Schedule sends its results to the outside world. You can send the results via emails and FTP servers. You can also send the results to a specified folder location.

How To: Creating a Report distribution list

1) Select the 'Reports' option from the configure menu or click the icon on the toolbar



2) Select 'Report Distribution Lists'
3) Click 'Create a New Report Distribution'
4) In the window that appears enter a name and click 'Next'
5) Specify which email addresses the reports will be sent to, click 'Next'
6) Specify whether to send the reports to the system FTP server, click 'Next'
7) Select a folder on the server (a network path) where a file containing the report may be stored
8) Click 'Finish'

Saving to file is run on the server. Setting up the file path must be local to that server. It is recommended that this be configured on the server itself.

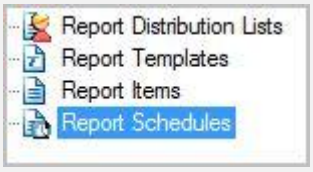
When saving to a file, if the file exists then the date file is created appended to the filename.

Scheduling Reports

Report Schedules are the means by which a set of report items can be configured to be run automatically and sent to various destinations at a certain time. Note that you must have configured at least one Report Distribution List before you can configure any report schedules.

How to: Creating scheduled Reports

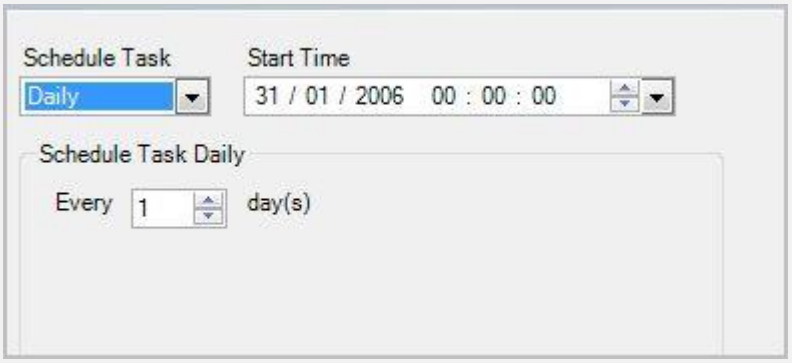
1) Select the 'Reports' option from the configure menu or click the icon on the toolbar



2) Select 'Report Schedules'

3) Click 'Create a Report Schedule'

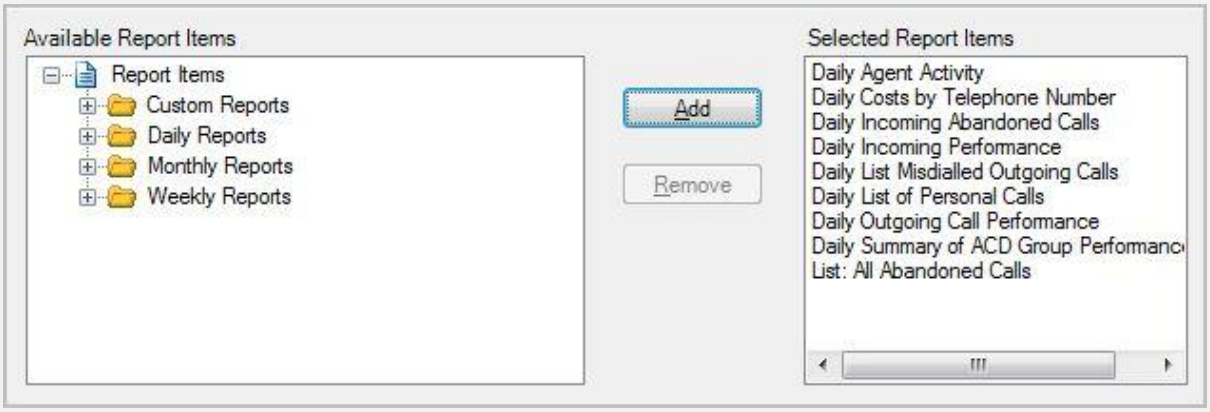
4) In the box that appears enter a name and click 'Next'



5) In the next window you can schedule how often a task occurs from the drop down menu, e.g. once, hourly…, you can alter the start time and alter how many days to schedule the task.

6) Click 'Next'

7) Select the report items to include by selecting them and clicking 'Add'



8) Click 'Next'
9) Specify the format in the next window
10) Click 'Finish'

When the schedule runs and is going via email then there is an email generated and each of the report items is included as attachments.

Chapter 18

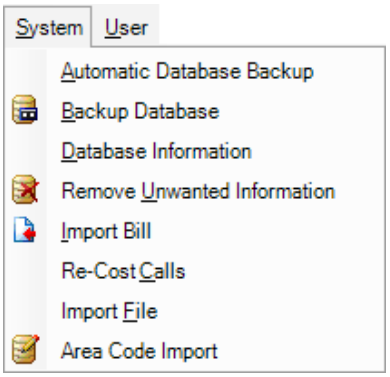
System Utilities

System configuration

System configuration menu provides a selection of system related utility functions

To access the menu click ‘System’ and select the required function from the drop down list

- Backup your database
- Database information
- Remove unwanted information
- Import a bill
- Re-cost calls
- Import Costing Files
- Area Code Import

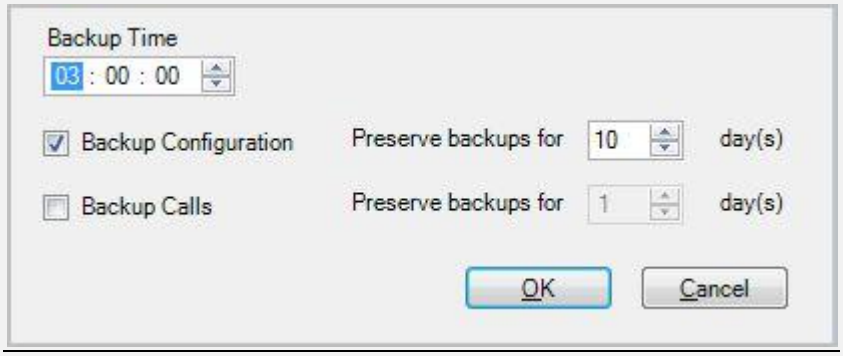


Automatic Backup

Create automated schedules for database backup. There are two databases which can be backed up Configuration and Calls. It is suggested that a regular backup of both databases is scheduled to eliminate problems if your system fails.

How To: Automatic Backup

1) Click 'System'
2) Select 'Automatic Backup'



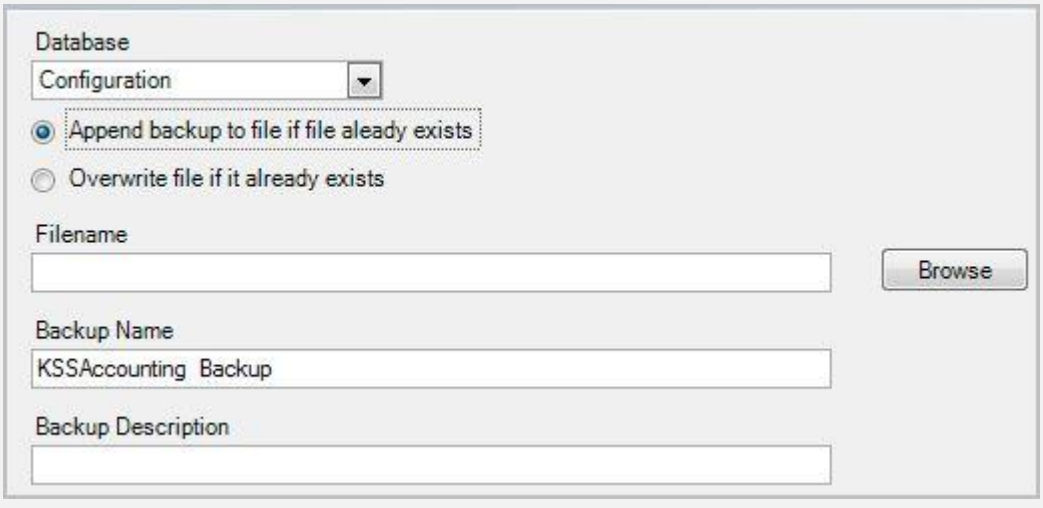
3) In the window that appears, you can alter the time of daily automatic backup along with how many days of historical copies to preserve.
4) Optionally you can also back up the calls database, by clicking the option 'Backup Calls'
5) Click 'OK'

Manual Backup

Alternatively you can manually backup the databases

How To: Back up the Database

1) Click 'System'
2) Select 'Backup database'

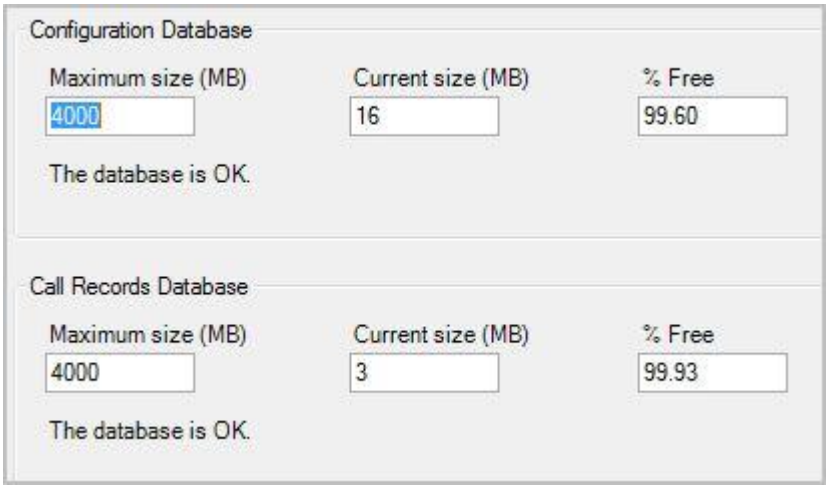


3) In the window that appears, select the database that you want to back up and enter the file name to use for the backup.
4) Optionally, you can provide a name and description for the backup: The filename MUST be a file local to this PC, backup CANNOT be made to network shares or UNC paths.
5) Click 'OK'

Database Information

To access the database information, select 'System' and click 'Database Information'

The window that appears provides all the information you need to know about the current state of your databases.

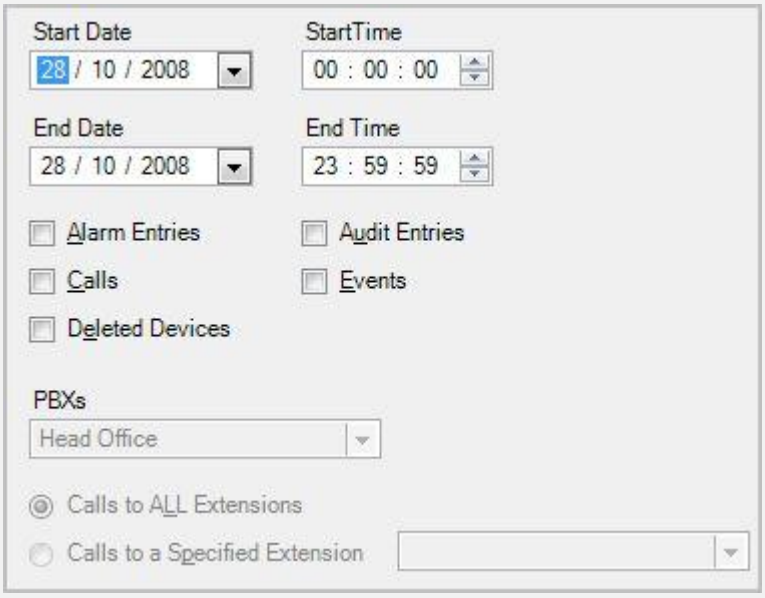


Removing unwanted information

You will from time to time need to remove information from the calls, alarms, audit entries, events or deleted devices lists. Deleted devices prevent those devices from being automatically reconfigured so be aware that removing them would allow the devices to automatically reconfigure.

How To: Remove unwanted information

1) Click 'System'
2) Select 'Remove Unwanted Information'



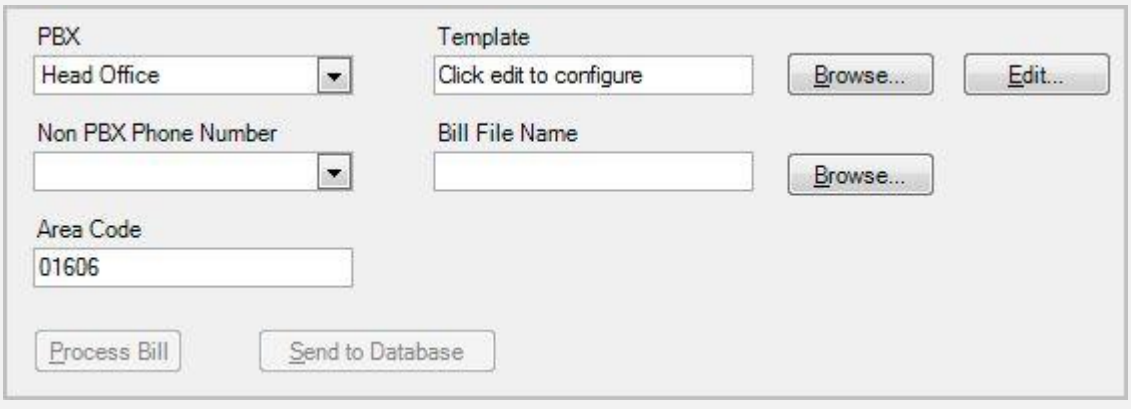
3) In the window that appears, select the date and time range that you wish to delete the information up to and the select the types of information to delete, e.g. alarm entries, calls…
4) Also you can select whether to remove calls to all extensions or calls to specified extensions.
5) Click 'OK'

Removal of unwanted information will result in a new audit entry being created detailing the fact that information has been removed. This audit entry cannot be removed.

Importing a Telephone bill

How To: Import a Telephone bill

1) Click 'System'
2) Select 'Import Telephone Bill'

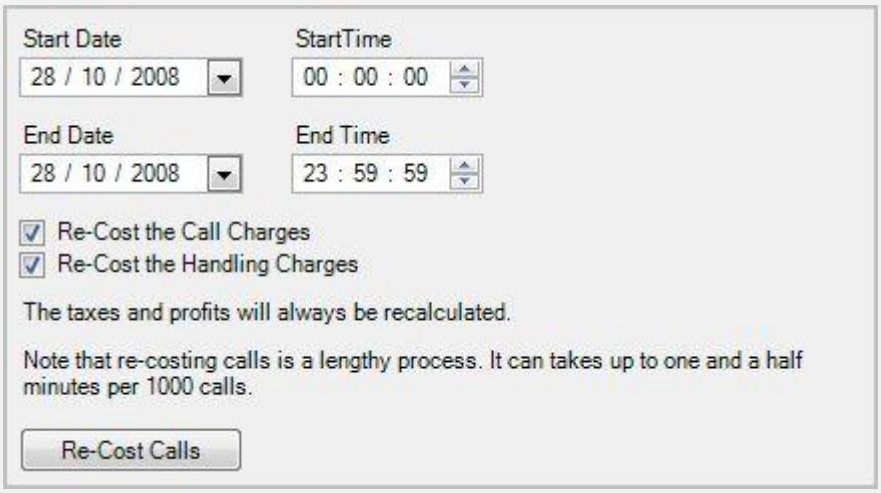


3) In the window that appears, you can import the calls that appear on an employee's home telephone bill. To do this you must set up a template so MyCalls knows how to read the bill.
4) Select the PBX, area code and phone number the bill is for
5) After the bill has been processed, a list of calls will be presented for approval.
6) If they are correct click the 'Send to Database' button
7) Click 'OK'

Re-costing calls

How To: Re-Cost calls

1) Click 'System'
2) Select 'Re-cost Calls'


Start Date
28 / 10 / 2008
StartTime
00 : 00 : 00
End Date
28 / 10 / 2008
End Time
23 : 59 : 59
Re-Cost the Call Charges
Re-Cost the Handling Charges
The taxes and profits will always be recalculated.
Note that re-costing calls is a lengthy process. It can takes up to one and a half minutes per 1000 calls.
Re-Cost Calls

3) In the window that appears you can re-cost calls over a specified time period, you may want to do this if a mistake was made entering call tariffs, taxes or profit margins. You can do this by altering the start/ end date and time.
4) Optionally, you can re-cost the actual call charges and/ or the handling charges by clicking the boxes.
5) The taxes and profits will always be recalculated.
6) Once you have altered the information click 'Re-cost Calls'
7) Click 'OK'

Area Code Import

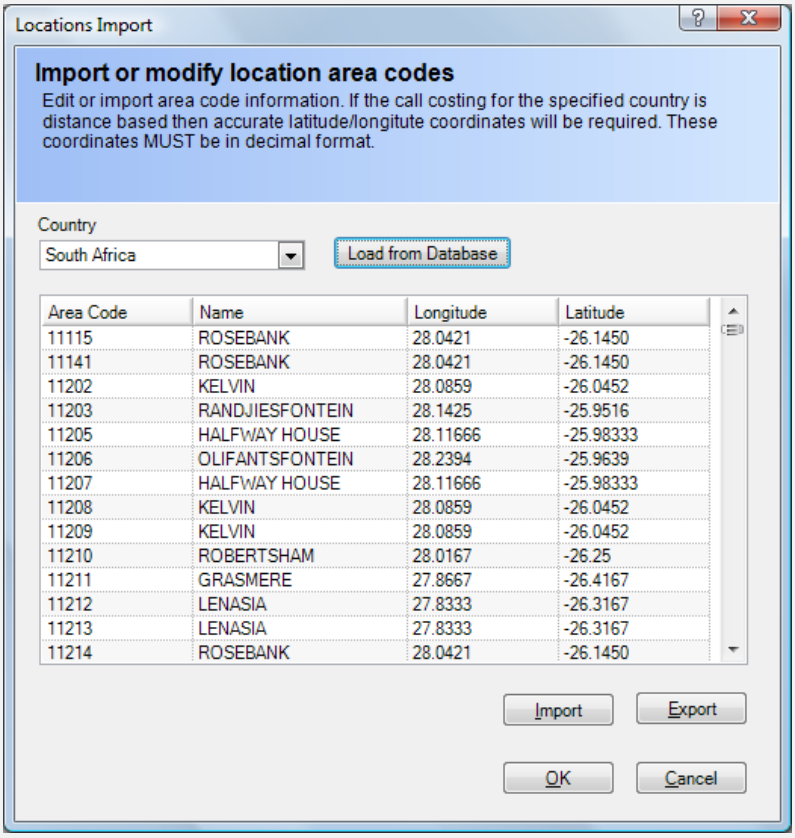
To import new area codes or change existing ones select the System -> Area Code Import option. This option will also allow you to modify the geographical coordinates for an area code if your country costs calls based on distance.

Quick tip:

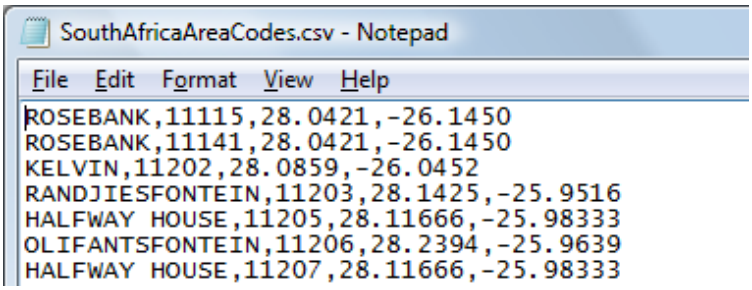
Only countries that are **not** covered by the country code 01 (North America) and 44 (United Kingdom) can be imported or edited.

How To: Import Area Codes

1) Click ‘System’
2) Select ‘Area Code Import’


Locations Import
Import or modify location area codes
Edit or import area code information. If the call costing for the specified country is distance based then accurate latitude/longitute coordinates will be required. These coordinates MUST be in decimal format.
Country
South Africa
Load from Database
Area Code | Name | Longitude | Latitude
11115 | ROSEBANK | 28.0421 | -26.1450
11141 | ROSEBANK | 28.0421 | -26.1450
11202 | KELVIN | 28.0859 | -26.0452
11203 | RANDJIESFONTEIN | 28.1425 | -25.9516
11205 | HALFWAY HOUSE | 28.11666 | -25.98333
11206 | OLIFANTSFONTEIN | 28.2394 | -25.9639
11207 | HALFWAY HOUSE | 28.11666 | -25.98333
11208 | KELVIN | 28.0859 | -26.0452
11209 | KELVIN | 28.0859 | -26.0452
11210 | ROBERTSHAM | 28.0167 | -26.25
11211 | GRASMERE | 27.8667 | -26.4167
11212 | LENASIA | 27.8333 | -26.3167
11213 | LENASIA | 27.8333 | -26.3167
11214 | ROSEBANK | 28.0421 | -26.1450
Import
Export
OK
Cancel

3) In the window that appears Select the country you wish to import or change.
4) Select Load from Database. The area codes for the selected country will be shown in the grid.
5) Either select Import or Export the current area codes for the country.
6) If exporting, then the file will be saved in a .CSV format, use an editor such as Notepad to make any changes. Use the import option to bring the new version back into the system.
7) Click ‘OK’ the new area codes will be saved back to the database



Quick tip:

When upgrading the system to a different version, any changes you make to the area codes will need to be re-imported!

Chapter 19

Importing Data Into MyCalls

Configuration data can be imported from a comma delimited file (CSV files). CSV files can be generated from programs such as excel spreadsheets.

Import is supported for the following types of entity:

- Account codes
- DDIs
- Extensions
- Pilot numbers
- Trunks
- Callers
- Users

The steps required to import a set of values are very similar for all the various entities. Devices all share the same import format. Callers and users have different formats.

Importing devices

Device Import formats

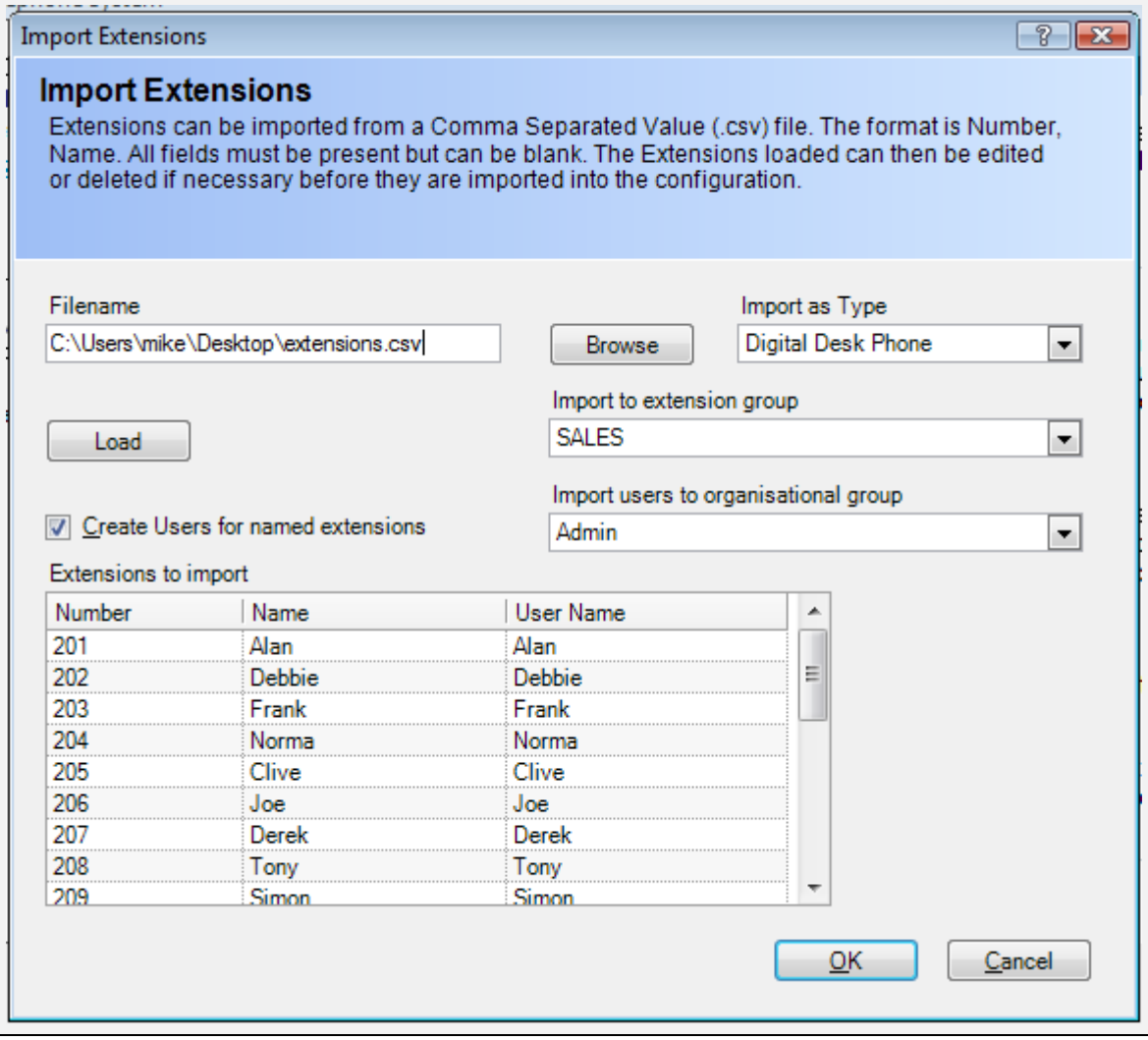
All devices follow the same format of Name, Extension. This is easily produced in either a text editor or any application which creates CSV files such as Microsoft Excel. Simply enter the list of values and export the list as a CSV file.

	A	B	C
1	201	Alan	
2	202	Debbie	
3	203	Frank	
4	204	Norma	
5	205	Clive	
6	206	Joe	
7	207	Derek	
8	208	Tony	
9	209	Simon	

The following example shows the process for importing extensions. Extensions are the most complex device to import, other devices follow the same series of steps but with fewer items to specify.

How to: Import a set of Extensions

1) Generate the CSV file (See formats below)
2) Navigate to the respective configuration screen Configuration->Telephone system->PBX->Extensions
3) Click the 'Import Extensions' option



4) From the 'Import' screen use the 'Browse' button to select the file containing your extensions to be imported.
5) If you are assigning all extensions as a specific type then select it from the 'type' menu
6) If you are importing these extensions to a specific extension group then select that group from the 'Import to extension group' menu
7) Clicking the 'Create users for named extensions' option creates organisational users for each extension (see section on organisation users)
8) Click 'Load'
9) The 'Extensions to import' grid will populate. You can now make final decisions as to which of these to import.
10) To edit an entry click on the field in the grid and simply type in the edited value
11) To delete an extension select the row and press your 'delete' key
12) If you make a mistake or delete a row unintentionally simply click the 'Load' button to reload the file
13) Once you are happy with your imported list click 'OK'
14) Your extensions are now imported into the configuration

Importing Callers

Callers are treated in the same way as devices (see example above). Simply load the CSV file and select the caller type to import. You can edit the loaded list prior to committing the import, in the same way as for devices.

Callers' CSV files have three fields, namely;

- Number – Numeric no spaces,
- Alternate Number – Numeric no spaces,
- Name.

Importing Users

By setting up a user based import file you are able to configure most user and extension related information which makes configuration of MyCalls much easier than configuring everything manually through Users are imported into organizational groups. The field format for users allows more values to be specified in addition to the user name.

Field Descriptions

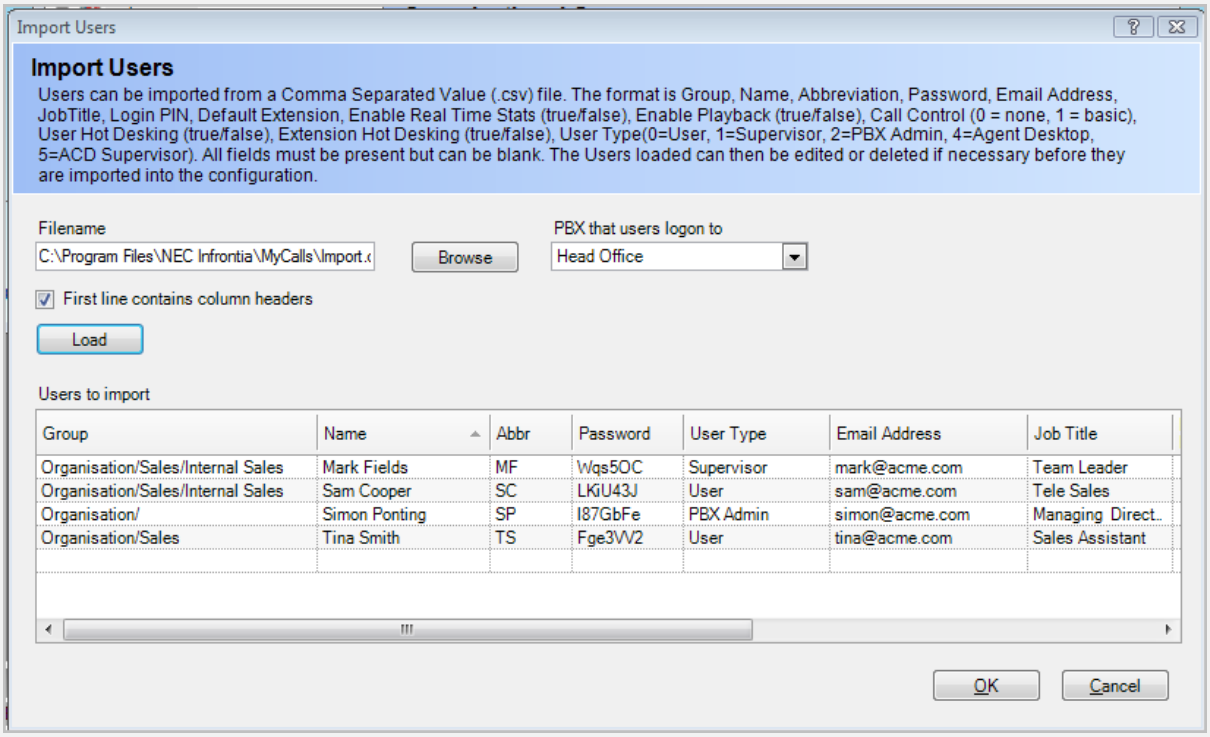
Group The organisation group the user will belong to. If left blank then the user will be added to the top level group. Groups will be created automatically and nested groups, such as Sales\Internal sales will create two groups, one called Sales that is under the top level group and another called Internal sales that is under the Sales group.

Name The name of the user that you wish to add. Note that

	appostrophe's are not valid.
Abbreviation	The abbreviated form of the the users name.
Password	Password the user will log on to the application with.
Email Address	Email address for the user
Job Title	Job Title of the user in the organisation
ACD Login PIN	The number entered by the user onto the telephone to identify them when logging them in the ACD system. If ACD is not enabled, supported on your telephone system then leave this field blank.
Default Extension	The extension number this user will normally use. This will allow calls from the extension to be assigned to this user if ACD is not used or if Hot desking clients from the application are not configfured.
Enable Statistics	Set to 'true' if real time windows are going to created to view the real time call activity for this user. Set this to 'false' if no windows are going to be shown. **This does not effect the reporting of extension call activity.** It is strongly recommended that no more than 100 users be configured with set to true as database and application performance will decrease dramatically.
Enable Call Playback	Set to 'true' if this user is going to be allowed to listen to call recording. Otherwise set to false.
Call Control	Set to '1' if call control for this user is to be enabled, otherwise '0'. If call control is not available on your system or has not been purchased then leave this field blank.
Enable User Hot Desking	This is used to present the user with a list of extensions to use if they can hot desk when they run the application client. Set to 'true' if this user is allowed to use other extensions for their daily work. If they always use the same extension then set this to 'false'.
Enable Extension Hot Desking	This is used to specify if the extension created in the default extension can be used by multiple people in a hot desking environment or only by one person. Set to 'true' if the extension is to be made available for multiple users, otherwise set to 'false'
User Type	Specifies the role within the application that the user will adopt and the features available. Use one of the following values: '0' - User, '1' - Supervisor, '2' - PBX Administrator, '4' - Agent Desktop User, '5' - ACD Supervisor.

How To: Importing Users

1) From the organization window (Configure->Organization) select 'organization' or one of the 'organization groups'
2) Select 'Import users'



3) Specify the file to import, load and import the users in the same way you load devices (see previous section)
4) Edit the values if required and click 'OK'
5) The data will be imported into MyCalls

Example FIles

There is a sample file 'import.xls' which is preconfigured with several examples of import data and this file can be found in your MyCalls installation folder.

Chapter 20

Acronyms & Glossary

Acronyms

ACD	Automatic Call Distributor
ACW	After-Call Work
AHT	Average Handling Time
ANI	Automatic Number Identification, also called caller ID.
ASA	Average Speed of Answer
ASP	Application Service Provider
ASR	Automatic Speech Recognition
ATA	Average lime to Abandonment
ATB	All Trunks Busy
CCR	Customer-Controlled Routing
CED	Caller-Entered Digits
CIS	Customer Information System
CLEC	Competitive Local Exchange Carrier/ CLI Calling Line Identity
CLID	Calling Line Identification
CMS	Call Management System
CO	Central Office
CPE	Customer Premises Equipment
CRM	Customer Relationship Management
CSR	Customer Service Representative
CTI	Computer Telephony Integration
DID	Direct Inward Dialling
DN	Dialled Number
DND	Do not disturb
DNIS	Dialled Number Identification Service
DTMF	Dual-Tone-Multi-frequency
EWT	Expected Wait Time
FCR	First-Call Resolution
FIFO	First In, First Out
FX	Foreign Exchange Line
GOS	Grade of Service
IM	Instant Messaging
IP	Internet Protocol
ISDN	Integrated Services Digital Network ISP Internet Service Provider
IVR	Interactive Voice Response

IXC	Interexchange Carrier
KM	Knowledge Management
KPI	Key Performance Indicator
LAN	Local Area Network
LEC	Local Exchange Carder
MIS	Management Information System
NCC	Network Control Centre
NOC	Network Operations Centre
PABX	Private Automatic Branch Exchange
PBX	Private Branch Exchange
PDA	Personal Digital Assistant
PRI	Primary Rate Interface
PSN	Public Switched Network
PSTN	Public Switched Telephone Network
QOS	Quality of Service
RNA	Ring No Answer
ROI	Return on Investment
SBR	Skills-Based Routing
SL	Service Level
SLA	Service Level Agreement
UCD	Uniform Call Distributor
VoIP	Voice over Internet Protocol
VPN	Virtual Private Network
VRU	Voice Response Unit
WAN	Wide Area Network

Glossary

Abandoned Call (Inbound): Also called a lost call. The caller hangs up before reaching an agent.

Abandoned Grade of Service: The percentage of calls that are abandoned after an acceptable amount of time. Calls that are abandoned before the specified time are not considered. A value of 97% is generally considered an adequate Abandoned Grade of Service.

Account Code: Also known as Project Codes or Bill-Back Codes. Account Codes are additional digits dialled by the calling party that provide information about the call. If all calls come into a central number then it is possible to enter an account code for each call to identify its purpose. Reports can then be run on specific account codes or groups to isolate those calls from all the others.

Alarm Distribution List: Identifies who the alarm notification should be sent to. It is possible to specify email addresses, computer names and processes to run.

Adherence to Schedule: A general term that refers to how well agents adhere to their schedules. The two terms most often associated with adherence include availability (the amount of time agents were available) and compliance (when they were available to take calls).

After-Call Work (ACW): Also called **wrap-up**, post call processing, average work time or not ready. Work that is necessitated by, and immediately follows, an inbound call.

Announcement Port: Generally used by an ACD system which periodically transfers a call to an announcement port and plays a reassurance message to the caller if there are no agents free.

Auto Attendant: The auto attendant feature is used to route incoming telephone calls based on selections or information provided by the incoming caller. The auto attendant feature may use interactive voice response (IVR) to prompt the caller to select the call routing based on category choices or it may use the calling number identification to determine the destination (e.g. a telephone number for a specific sales group).

Agent: The person who handles incoming or outgoing contacts.

Agent Status: The mode an agent is in (e.g., talk time, after-call work, unavailable, etc.).

All Trunks Busy (ATB): When all trunks are busy in a specified trunk group. Generally, Trunk Usage reports indicate the percentage of trunks busy over a period of time as a percentage of potential usage for the whole group over that period

Analogue: Telephone transmission or switching that uses a fluctuating voltage signal to transmit information.

Analytics: Advanced data analysis and reporting tools that enable the organisation to better understand customer trends and business activities.

Announcement: A recorded verbal message played to callers.

Answered Call: When referring to an agent group, a call is answered when reaches an agent.

Auto Wrap-Up: An ACD feature whereby the ACD is programmed to automatically put agents into after-call work after they finish talk time and disconnect calls. When they have completed any after-call work required, they put themselves back into available.

Automated Greeting: An agent's pre-recorded greeting that plays automatically when a call arrives at his or her telephone station.

Automatic Call Distributor (ACD): A mechanism controlled by the PBX switch or call management software which can distribute calls among agents in an attempt to even out the distribution of calls to each agent.

Automatic Number Identification (ANI): A telephone network feature that passes the number of the phone the caller is using to the call centre in real-time. ANI is an American term Calling Line Identity (CLI) is an alternative term used elsewhere.

Availability: The time the agent spends handling calls or waiting for calls to arrive.

Available State: The work state of agents who are signed on to the ACD and are waiting for calls to arrive.

Average Call Value: A measure common in revenue-producing call centres. It is total revenue divided by total number of calls for a given period of time.

Average Handling Time (AHT): The sum of average talk time plus average after-call work.

Average Holding Time on Trunks (AHT): The average time inbound transactions occupy the trunks.

Average Time to Answer (ATA or ASA): A measure that reflects the average delay of all calls including those that receive an immediate answer. Also called average delay.

Average Abandonment Time (AAT): Also called average delay to abandon. The average time that callers wait in queue before abandoning. The calculation considers only the calls that abandon.

Barge-In: An ACD feature that allows a supervisor or manager to join or "barge-in" on a call being handled by an agent.

Blended Agent: An agent who handles both inbound and outbound calls, or who handles contacts from different channels (e.g., email and phone)

Call: Also called contact, interaction or transaction. Although it most often refers to a telephone call, call can also refer to a video call, a Web call and other types of customer contacts

Call Forcing: An ACD feature that automatically delivers calls to agents who are available and ready to take calls. This is sometimes called automatic answer.

Call Load: Also called workload. Call load is volume multiplied by average handling time, for a given period of time

Call Recording: A type of monitoring in which the supervisor or automated system records a sampling of calls. The person conducting the monitoring then randomly selects calls for evaluation of agent performance.

Call Time Alarms: Determines what the acceptable minimum and maximum average call times should be in a one hour period. An average call time that is less than the minimum value can indicate that you may be rushing your calls. An average call time that is more than the maximum value indicates that the calls are taking too long and you may need to speed up the conversation.

Caller Alarms: Determines if a caller has been contacted within a specified time period.

Caller Tolerance: How patient callers will be when they encounter queues or experience busy signals.

Caller-Entered Digits (CED): Digits callers enter using their telephone keypads. The ACD, IVR, or network can prompt for CEDs.

Calls in Queue: A real-time report that refers to the number of calls received by the ACD system but not yet connected to an agent.

Carrier: A company that provides telecommunications circuits, Carriers include both local telephone companies, also called local exchange carriers (LEC5), and long-distance providers, also called inter-exchange carriers (IXCs).

Circuit: A transmission path between two points in a network.

Combination Values: A real-time display of a parameters shown together. For example, number of incoming + outgoing and abandoned calls

Computer Telephony Integration (CTI): The software, hardware and programming necessary to integrate computer systems and telephone systems so they can work together seamlessly and intelligently.

Contacts Per Hour: An outbound term that refers to the number of contacts divided by agent hours on the dialler.

Cost Per Call: Total costs (queued and variable) divided by total calls *01 a given period of time.

Customer Expectations: The expectations customers have of a product, service or organization.

Delay: Also called queue time. The time a caller spends in queue waiting for an agent to become available. Average delay is the same thing as average speed of answer.

Delay Announcements: Recorded announcements that encourage callers to wait for an agent to

Delayed Call: A call which cannot be answered immediately and is placed in a queue.

DID: Direct Inward Dial, A service offered by telephone companies which allows the last 3 or 4 digits of a phone number to be transmitted to the destination PBX. A company may for example have 10 lines but the company could publish up to 1000 numbers if 3 digit DIDs are used. Each of these numbers can be assigned a purpose and routed to the appropriate extension or group.

Dialled Number (DN): The number that the caller dialled to initiate the call.

Dialled Number Identification Service (DNIS): A string of digits that the telephone network passes to the ACD, IVR or other device to indicate which telephone number the caller dialled, One trunk group can have many 1)NIS numbers.

Fast Clear Down: A caller who hangs up immediately after hearing a delay announcement.

First-Call Resolution: The percentage of calls that do not require any further contacts to address the customer's reason for calling. The customer does not need to contact the call centre again to seek resolution, nor does anyone within the organization need to follow up.

Forecasting: The process of predicting call centre workload and other activities.

Gateway: A server dedicated to providing access to a network.

Grade of Service (GOS): The probability that a call will not be connected to a system because all trunks are busy. Grade of service is often expressed as p.O1 meaning 1 percent of calls *11 be blocked. Sometimes grade of service is used interchangeably with service level, but the two terms have different meanings.

Handled Call: A call that is received and handed by an agent or peripheral equipment.

Handling Time: The time an agent spends in talk time and after-call work handling a transaction.

Historical Report: A report that tracks call centre and agent performance over a period of time.

Idle Time: The time agents are available and waiting for calls.

Instant Messaging (IM): A type of text-chat between two or more Internet users.

Integrated Services Digital Network (ISDN): A set of international standards for digital telephone transmission.

Interactive Voice Response (IVR): An IVR system responds to caller entered digits or speech recognition in much the same way that a conventional computer responds to keystrokes or clicks of a mouse. When the IVR is integrated with database computers, callers can interact with databases to check current information (e.g., account balances) and complete transactions (e.g. make transfers between accounts).

Least Cost Routing (LCR): is an automated function which routes outgoing calls via the cheapest telecom operator available, usually by dialling a prefix to the telephone number

Local Area Network (LAN): The connection of multiple computers within a building so that they can share information, applications and peripherals.

Local Exchange Carrier (LEC): Telephone companies responsible for providing local connections and services.

Long Call: A call that has exceeded a specified talk time. Used to identify which calls are taking longer to handle. Can be used as a measure for further training of the operator or agent.

Longest-Available Agent: Also referred to as most-idle agent. A method of distributing calls to the agent who has been sitting idle the longest. With a queue, longest available agent becomes next available agent.

Longest Delay (Oldest Call): The longest time a caller has waited in queue, before abandoning or reaching an agent.

Manual Answer: The ACD system is set up so that agents must manually answer calls.

Manual Available: The ACD system is set up so that agents must put themselves back into the available mode after completing any after call work.

Most Frequent Calls Report: Report that provides a list of the most frequent numbers dialled or answered. The report can be configured to include or exclude and combination of call types or device

Next-Available Agent: A call distribution method that sends calls to the next agent who becomes available. The method seeks to maintain an equal load across skill groups or services. When there is no queue, next-available agent reverts to longest-available agent.

Non ACD Calls: Inbound calls that are directed to an agent's extension rather than to a general group. These may be personal calls or calls from customers who dial the agents' extension numbers.

Offered Call: Offered calls include all times a call has been presented to an agent either answered or not.

Off-Peak: Periods of time other than the call centre's busiest periods. Also a term used to describe periods of time when long-distance carriers provide lower rates.

Overflow: Calls that flow from one group or site to another. More specifically intraflow happens when calls flow between agent groups and interflow is when calls flow out of the ACD to another site.

Other ACD Calls: Calls routed via an ACD queue to an agent but not from the queue in which a supervisor may be responsible.

Pilot Number: A number that represents an ACD or hunt group. A call can be either made directly to this number or routed to this number if it is an incoming call.

PBX/ACD: A private branch exchange (PBX) that is equipped with ACD functionality.

Peaked Call Arrival: A surge of traffic beyond random variation. It is a spike within a short period of time. There are two types of peaked traffic — the type you can plan for, and incidents that are impossible to predict.

Private Branch Exchange (PBX): Also called private automatic branch exchange (PA8X). A telephone system located at the call centre's site that handles incoming and outgoing calls. ACD software can provide PBXs with ACD functionality. Many refer to a PBX as a switch.

Queue: Queue literally means 'line of waiting people. Holds callers until an agent becomes available.

Queue Status Alarms: Determines the acceptable number of calls in a queue, and also the acceptable amount of time that a call can remain in a queue before being answered.

Real Time Statistics: The Real Time Statistics are available on a group basis and are a summary of a selected set of the available Single Value parameters.

Received Call: A call detected and seized by a trunk. Received calls will either abandon or be answered by an agent.

Report Schedule: A series of configured report items that will be run together at a specified time.

Report Template: The definition that forms the basis of an ad-hoc report or saved report item.

Ring Delay: Also called delay before answer. An ACD feature that enables the system to adjust the number of rings before the system automatically answers a call.

Service Level Alarms: Determine the minimum average and maximum average acceptable Grade of Service (GOS) in a one hour period. A value below the minimum average can indicate that there are not enough staff available to take all of the calls. Conversely, if the value is above the maximum value it might indicate that there are too many people available to answer calls.

Single Value Parameter: A real-time parameter that holds information about one statistic. For example, Number of Incoming Calls.

System Alarms: Are triggered when either no data is received from the PBX for a certain period or if the free disk space on the disk that the database is situated on is below a specified level.

Screen Monitoring: A system capability that enables a supervisor or manager to remotely monitor the activity on agent's computer terminals.

Screen Refresh: The rate at which real-time information is updated on a display. Screen refresh does not correlate with the time frame used for real-time calculations.

Skills-Based Routing: An ACD capability that matches a caller's specific needs with an agent that has the skills to handle that call, on a real-time basis.

Talk Time: Everything from hello to goodbye in a phone call. In other words it's the time callers are connected with agents. Anything that happens during talk time, such as placing customers on hold to confer with supervisors, should be included in this measurement.

TCP/IP Trunk: A trunk that routes calls through the internet rather than the PSTN.

Telemarketing: Generally refers to outbound calls for the purpose of selling products or services, or placing informational calls to customers, prospective customers or constituents.

Time Parameter Distribution Report: Report that list the number of calls that have either a wait, call or hold time within a specified time period. The time periods can start at any value, end at any value and each interval can be any size.

Toll Fraud alarms: Determines whether a call is too expensive or lasts for too long or is to/from a specific destination.

Trunk: Also called a line, exchange line or circuit. A telephone circuit linking two switching systems.

Trunk Group: A collection of trunks associated with a single peripheral and usually used for a common purpose.

Trunk Load: The load that trunks carry. Includes both delay and talk tine.

Unavailable Codes: A user has made themselves unavailable to take calls from an ACD system for whatever reason. It is usual to supply a reason code or unavailable code when going unavailable so to track the reasons why this state has been entered.

User Login/Pin code: A unique number that the user enters to associate themselves with the telephone system to inform them they are able to take calls, usually on one or more ACD queues.

User Login (MyCalls): A unique username and password combination assigned to a MyCalls User to allow the user to use the MyCalls application.

Wallboard: Also called reader boards, display boards or wall displays. A visual display, usually mounted on the wall or ceiling that provides real-time and historical information on queue conditions, agent status and call centre performance.

Wide Area Network (WAN): The connection of multiple computers across a wide area.

Wrap-Up Codes: Codes which agents enter on their phones to identify the types of calls they are handing. The ACD can then generate reports on call types by handling time, time of day, etc.

Appendix A

MyCalls Licensing

MyCalls uses a licensing system to control the features available within the product. Once MyCalls has been installed the user will be unaware of any licensing mechanisms other than the fact that certain features will be unavailable.

There are several versions of the MyCalls Product

MyCalls XN120

MyCalls XN120 Call Manager

MyCalls Aspire/SV8100

MyCalls Aspire/SV8100 Call Manager

MyCalls Aspire/SV8100 Call Centre

MyCalls SV8100 Desktop

The default license purchased for each contains the following features.

Feature	**XN120**		**Aspire/ SV8100**			
	MyCalls	MyCalls Call Manager	MyCalls	MyCalls Call Manager	MyCalls Call Centre	MyCalls Desktop
Default PBXs	1	1	1	1	1	1
Concurrent Users	1	1	1	1	1	1
Default Extensions	24	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
DIDs	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Abandoned Calls		Yes		Yes	Yes	No
Costing		Yes		Yes	Yes	No
Performance Monitoring		Yes	Yes	Yes	Yes	No
Organisation/Users		Yes		Yes	Yes	Yes

User Costing		Yes		Yes	Yes	No
ACD					Yes	No
Real Time Status			Yes	Yes	Yes	No
Scheduling		Yes		Yes	Yes	No
Grade of Service		Yes	Yes	Yes	Yes	No
Callers		Yes		Yes	Yes	No
Import		Yes		Yes	Yes	No
Alarms	Basic	Full	Basic	Full	Full	No
Agent Control					Optional	No
Call Playback		Optional		Optional	Optional	No
Reporting	Basic	Full	Basic	Full	Full	No
Backup/Restore		Yes		Yes	Yes	No
ACD Supervisors					1	No
Wallboard Users				Optional	Optional	No
Concurrent Agents					Optional	No
Digital Playback Trunks		Optional		Optional	Optional	No
Analog Playback Trunks		Optional		Optional	Optional	No
Call Player Type	No	Optional	No	Optional	Optional	No
Call Playback Audit	No	Optional	No	Optional	Optional	No
Hot-Desk Users	No	No	No	0	0	No
Desktop Only	No	No	No	No	No	Yes
Call Control Users	0	0	0	0	0	1
Call Control	No	No	No	Optional	Optional	Yes
Screen Pop	No	No	No	Optional	Optional	Yes

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